customaze Email Marketing 2.6.0.0

For Microsoft Dynamics CRM 2011

Installation and Manual

Version 1.1

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What's new in 2.6

- Support for CRM 2011 Active Directory, Claims-Based and IFD Authentication
- Recommended SQL Server connection method is now using Windows Authentication
- We require a dedicated website for our add-ons now. We do know that this is inconvenient, but it is the only supported way by Microsoft at this time.

Known problems

- No support for CRM Online at this time
- AD FS 2.1 (Windows Server 2012) has a known bug which prevents SDK calls from working. Please apply the following KB-Article: http://support.microsoft.com/kb/2828015

Installation

System requirements

You need to have the following Software installed on the target server:

- Windows 2008 R2 or Windows Server 2012
- Works only with 64 bit operating systems
- Microsoft CRM 2011
- Microsoft .NET-Framework 4.0
- Microsoft Windows Identity Foundation SDK V 4.0
- Special User in the CRM

Permission requirements

You need the following permissions for the installation:

- System Administrator
- Deployment Administrator for the CRM installation
- Sysadmin role for the SQL-server

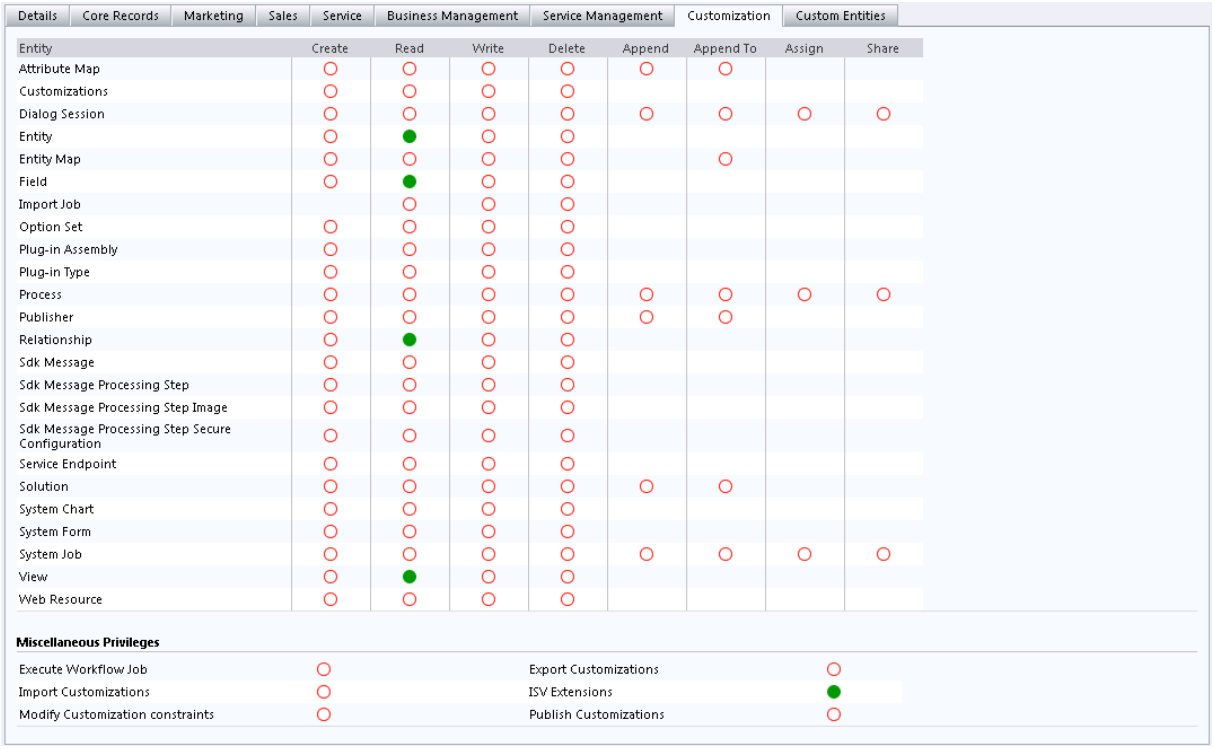
Pre-Installation Tasks

Special CRM User

The E-Mail Marketing tool needs a special User to read and write data to the CRM and the SQL-Server. Please create a new User in your Active Directory with at least Local Administrator Permissions for the CRM Server. Create a new CRM User with System-Administrator Role for the new Active Directory Account. If you have already a special User which exist in your AD and CRM you can use it. Please verify that the User has the required permissions.

CRM Security Role

All users accessing the E-Mail Marketing tool must be allowed to read the CRM's meta data. Please create a security role in CRM called "crmUp E-Mail Marketing" (or similar) and allow the members of that role to read the entity and attribute meta data.



It is advisable to give the CRM users certain other permissions for E-Mail Marketing as well; send activities impersonating another identity could be one of them. But this is outside the scope of this document.

Dedicated website in IIS

Logged on to the CRM server, create a new website that listens to a different port or host name than the website CRM uses. If your CRM uses http://crm.local you could use a subdomain like http://crmup.crm.local. Remember that you need to add that name to your DNS too.

If you use HTTPS/SSL, you will need to use a second IP or another port.

Apart from the website itself, there's nothing to configure. Setup will handle creation of the application pool etc. It is recommended to add the newly created website to the Intranet zone of your clients to prevent them from having to authenticate again.

You need to follow the instructions in this KB article to prevent 401 errors when Email Marketing tries to download images from the new website (this triggers the loopback check): http://support.microsoft.com/kb/896861. **This is important**. Email Marketing won't work properly when the loopback check is not disabled or the additional hostname is added to the allowed host names.

Upgrading E-mail Marketing for CRM 4 to CRM 2011

Remarks

- We do **not** support in place upgrades
- Do not uninstall E-mail Marketing in the old environment
- It is recommended to have access to the registry of the old environment during the installation of the new environment because some settings can be copy and pasted into the new environment
- You'll need a new license code, because you'll have a new machine name. You do not need a new contract id, only the license code has to be updated.
    - If you have a running support contract with us, just send us the contract id associated with the license and the new fully qualified (including the internal domain name) server name. We'll upgrade the license free of charge.
    - If you do not have a running support contract, please contact us for a quote for the upgrade. Please mention your old contract id in the email.

Upgrade outline

a) Install new SQL-Server and new CRM server as recommended by Microsoft for CRM 2011
b) Shut down the old installation of Email Marketing
    a. Stop and disable both customaze services on the old machine. This is very important, because Email Reactions would otherwise still be transferred into the old environment.
    b. But remember: Do not uninstall the software nor remove the custom entity "Email Reactions" from the system.
c) Transfer both databases (organization_MSCRM and organization_EmailMarketing) to the new SQL server
d) Import the organization into the new CRM 2011 deployment as usual. Do not rename the organization.
e) Add permissions for the App Pool account to the organization_EmailMarketing database. The account needs datareader and datawriter permissions and should be mapped to the dbo schema.
f) Make sure CRM itself is running fine after the upgrade
g) Create a second website on the CRM server (see Pre-Installation Tasks)
h) Install Email Marketing for CRM 2011 on the new CRM server
    a. Use the new SQL server and Windows Authentication for database access
    b. Use the same contract id and security code as the old installation did use. The license code has to be upgraded, though. Please see remarks above.
    c. Stop the customaze-* services
    d. Set the Identity of the Service to the same Identity as the crmup app pool

e. You can (and should) copy over the registry value LastKnownId from the old installation to prevent duplicated Email Reactions. Location in the registry is HKLM\Software\customaze Email Marketing\<organization>
f. You can also copy over some more configuration entries there if you would like to use SMTP based sending. Or you can use the Email Marketing Configurator to set them again.
g. Start the customaze-* services again and have a look into the Application log in the Event Viewer. If there are no error messages, chances are high that everything works fine.

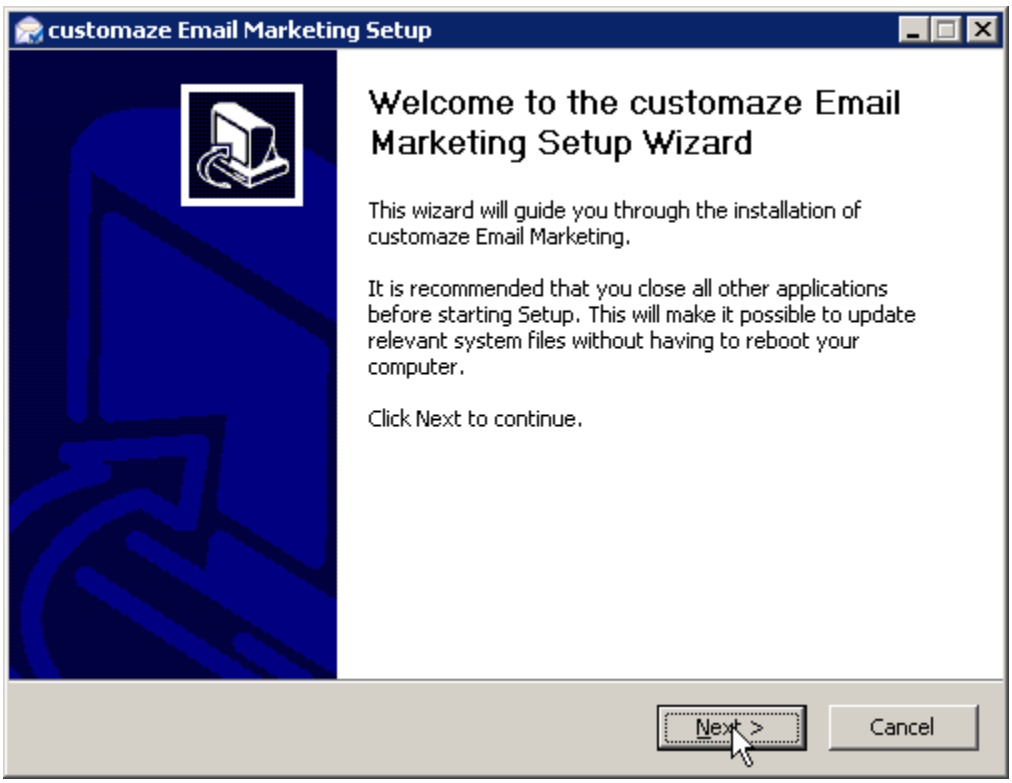
i) Verify the installation by opening up an old campaign. Take a look at the statistics: All data there? If not, verify that you really copied over the databases correctly and just re-run the setup.
j) Create a new Email Marketing distribution and verify if it is send out correctly

Handy tools and hints:

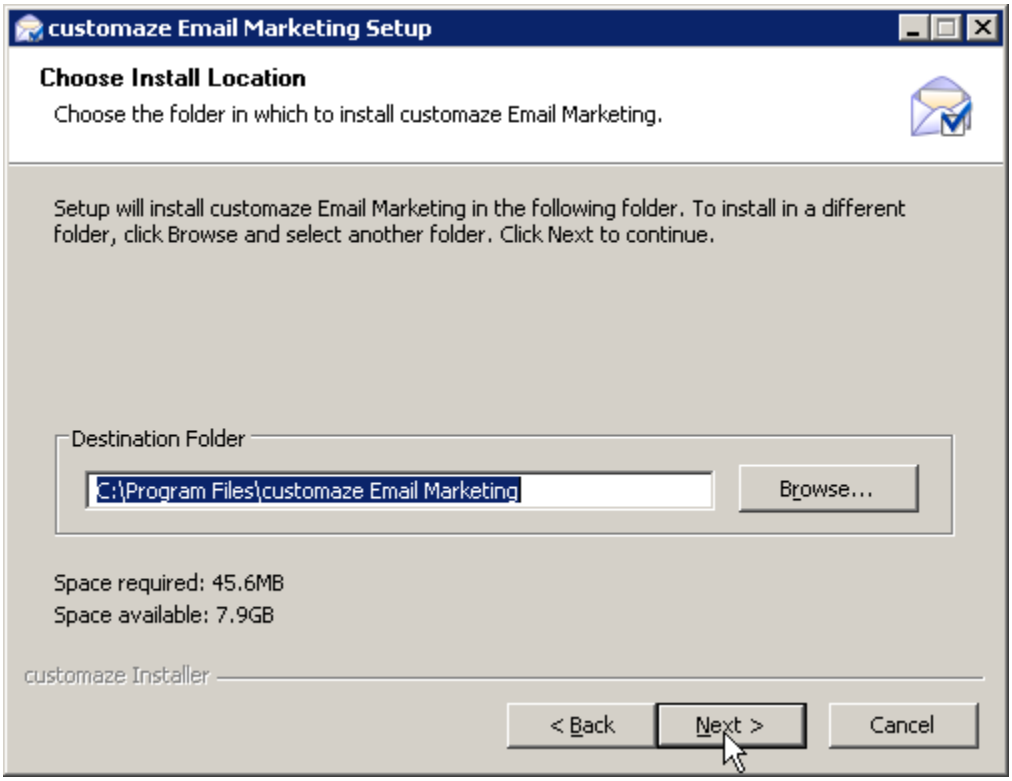
- Most errors can be traced down in the CRM trace log. Visit the Microsoft Knowledge Base to learn how to enable tracing and have a look into the logs.
- CRM 2011 seems to have problems with multiple bindings to its website. Make sure you do not have multiple hostnames or multiple http listeners bound to the website.
- Verify if the problem is permission related: Use a system administrator and try to reproduce the problem.
- Download the Plugin Registration Tool in CRM SDK and verify if the EMM Engine assembly has been registrated in the organization (needed for our custom workflow methods)
- Verify if the URLs in HKLM\Software\Microsoft\MSCRM are correct
- Verify if the URLs in the MSCRM_Config database in the table DeploymentProperties are correct. Any modifications needed here: Restart CRM (IIS and services).

Installation

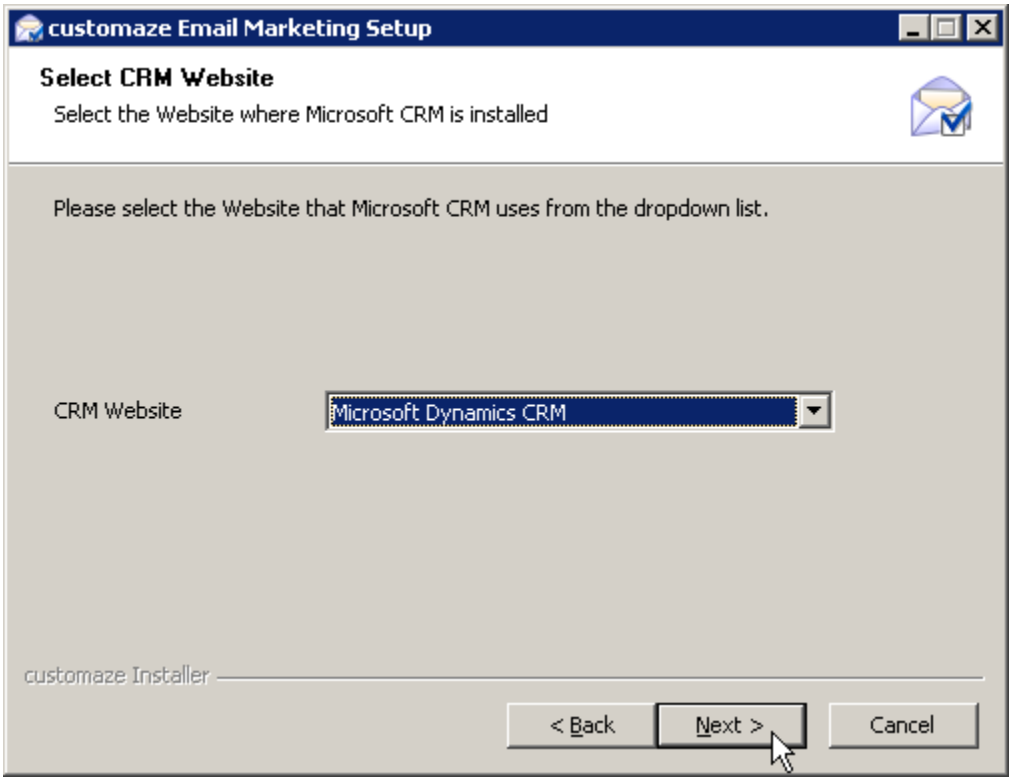
Please execute the setup file provided to you logged on the CRM server as administrator to start the installation. **You must be Deployment Administrator for the installation to work correctly**.


customaze Email Marketing Setup
Welcome to the customaze Email Marketing Setup Wizard
This wizard will guide you through the installation of customaze Email Marketing.
It is recommended that you close all other applications before starting Setup. This will make it possible to update relevant system files without having to reboot your computer.
Click Next to continue.
Next >
Cancel

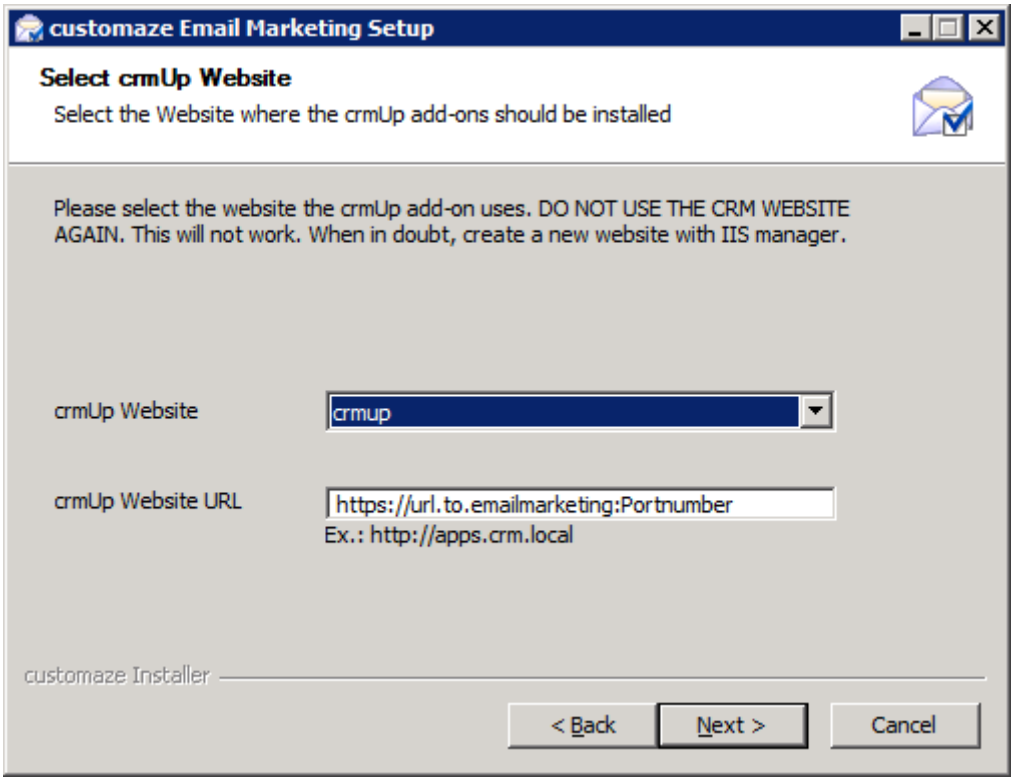
Click **Next**


customaze Email Marketing Setup
Choose Install Location
Choose the folder in which to install customaze Email Marketing.
Setup will install customaze Email Marketing in the following folder. To install in a different folder, click Browse and select another folder. Click Next to continue.
Destination Folder
C:\Program Files\customaze Email Marketing
Browse...
Space required: 45.6MB
Space available: 7.9GB
customaze Installer
< Back
Next >
Cancel

Select the installation directory and click **Next**.


customaze Email Marketing Setup
Select CRM Website
Select the Website where Microsoft CRM is installed
Please select the Website that Microsoft CRM uses from the dropdown list.
CRM Website
Microsoft Dynamics CRM
customaze Installer
< Back
Next >
Cancel

Select the Website where Microsoft CRM is installed. A virtual directory will be created in the ISV folder. Click **Next**.


customaze Email Marketing Setup
Select crmUp Website
Select the Website where the crmUp add-ons should be installed
Please select the website the crmUp add-on uses. DO NOT USE THE CRM WEBSITE AGAIN. This will not work. When in doubt, create a new website with IIS manager.
crmUp Website
crmup
crmUp Website URL
https://url.to.emailmarketing:Portnumber
Ex.: http://apps.crm.local
customaze Installer
< Back
Next >
Cancel

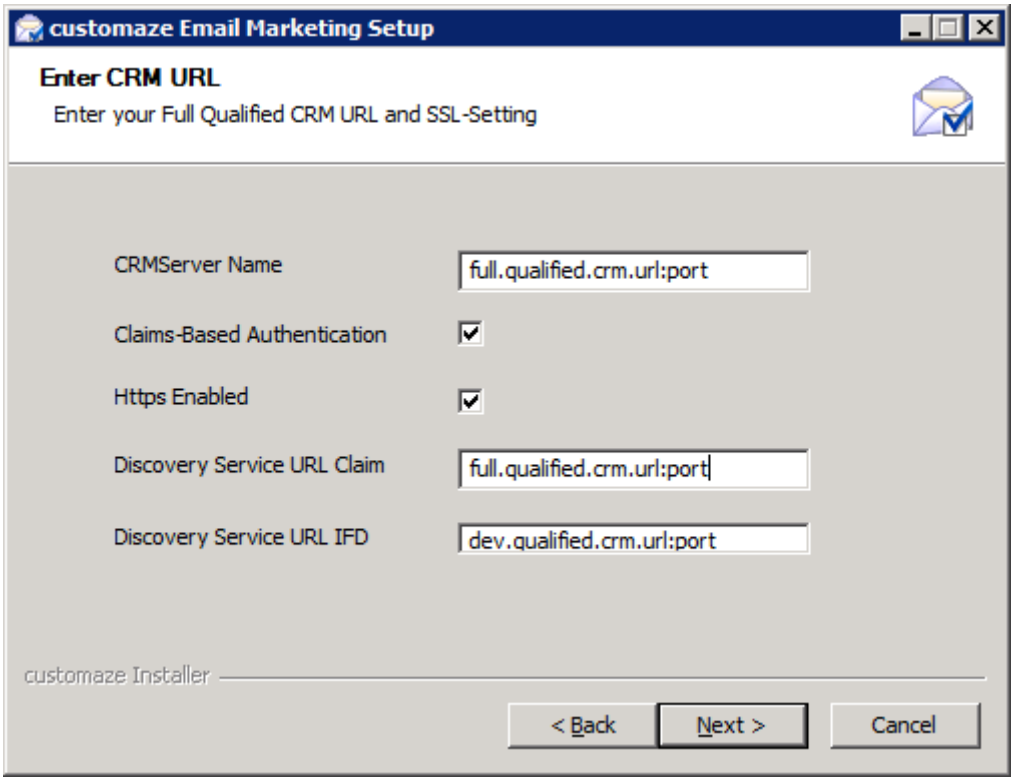
You need to create a website dedicated for our add-ons. This website must be different from the CRM website and it needs a second hostname, a subdomain or a different port.

Read Pre-Installation tasks in this manual for more information.

When you have created that website, restart setup to reload the data.

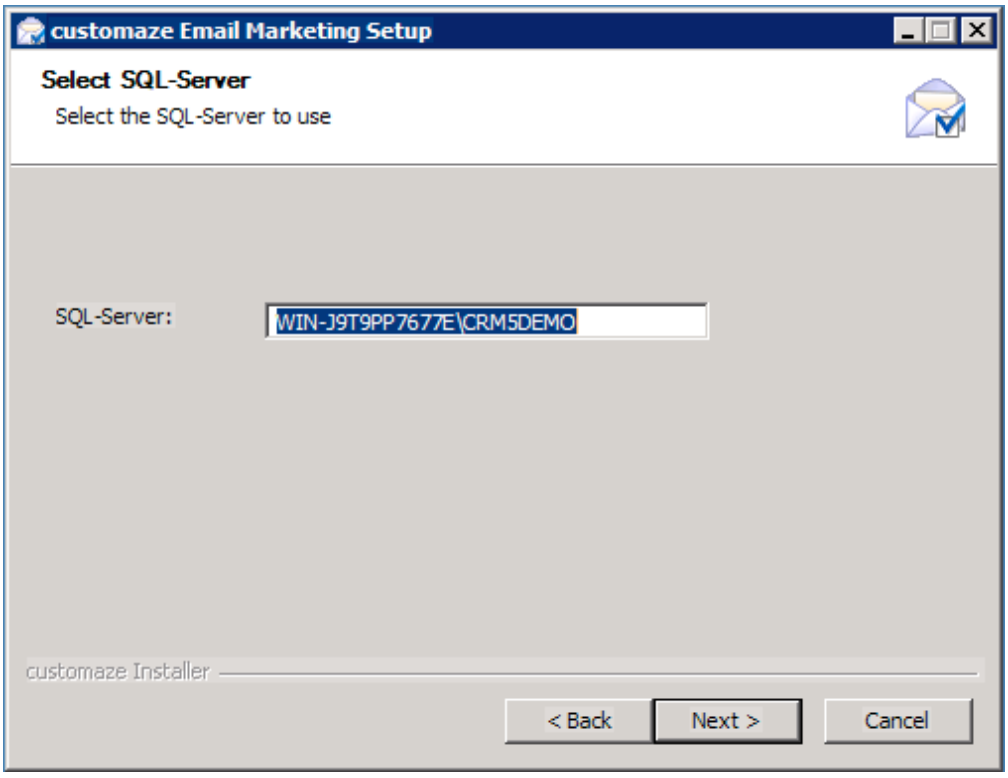
DO NOT USE THE MICROSOFT DYNAMICS CRM WEBSITE. THE SETUP WILL MODFIY THE APPLICATION POOL FOR THE SELECTED WEBSITE.

Enter the URL that the client uses to access the new website; in some cases, this can be a different URL than the internal one (think of reverse proxy scenarios with ISA/TMG). In most cases, this will be the hostname that you bound the website to in IIS manager. Click **Next**

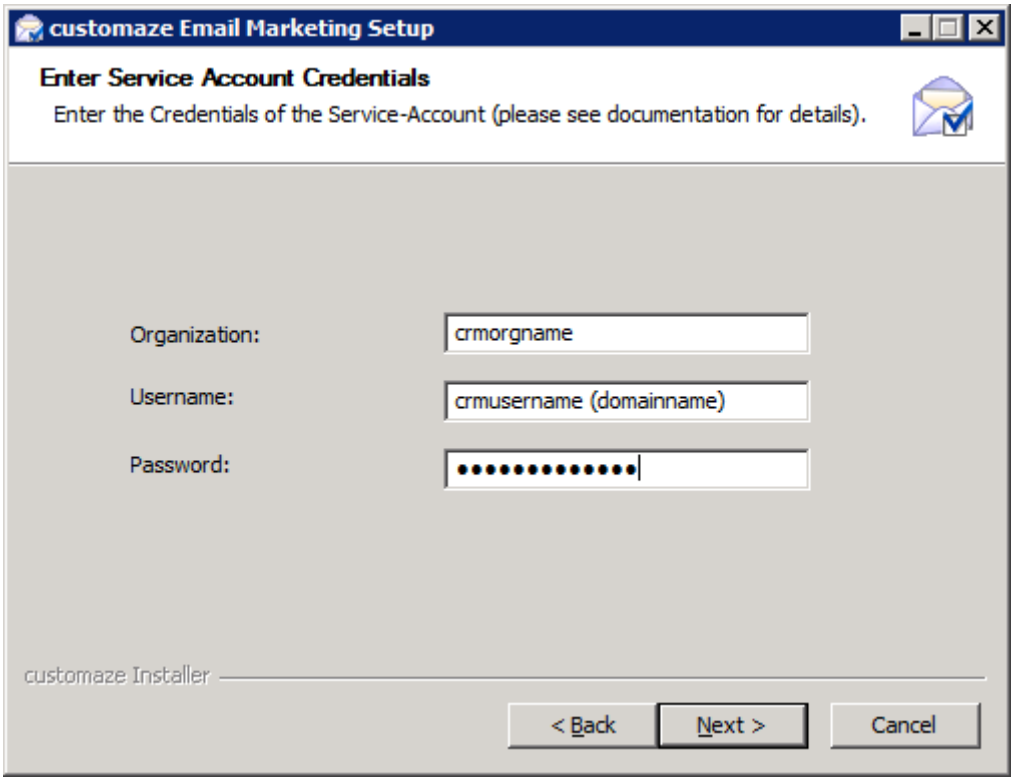


Enter your CRM Settings and the CRM server's URL without the http/s prefix and select if you are using SSL. You only have to fill out the fields which are need by your CRM configuration. If you are not sure which Settings are required, please ask the person which setup your CRM-Server. Click **Next**

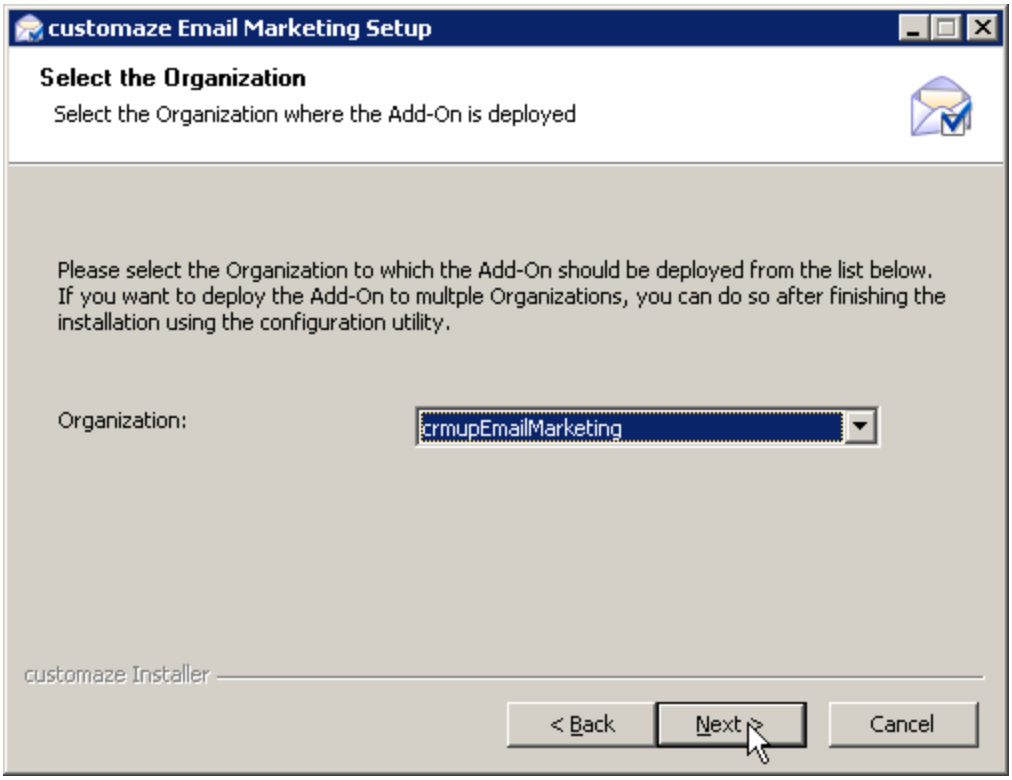
(If you not sure what to enter see the Appendix "How to determine CRM URL")



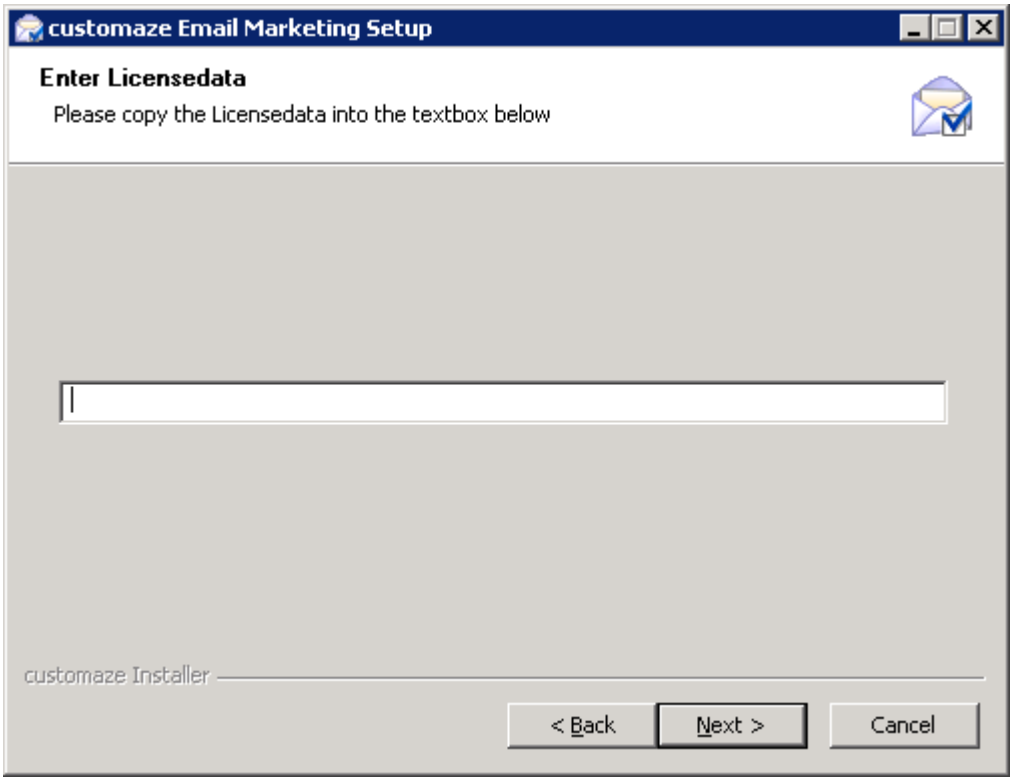
Enter the name of the SQL Server to use for the additional E-Mail Marketing database. If you're using a named instance, use a backslash to separate the instance name. Click **Next**



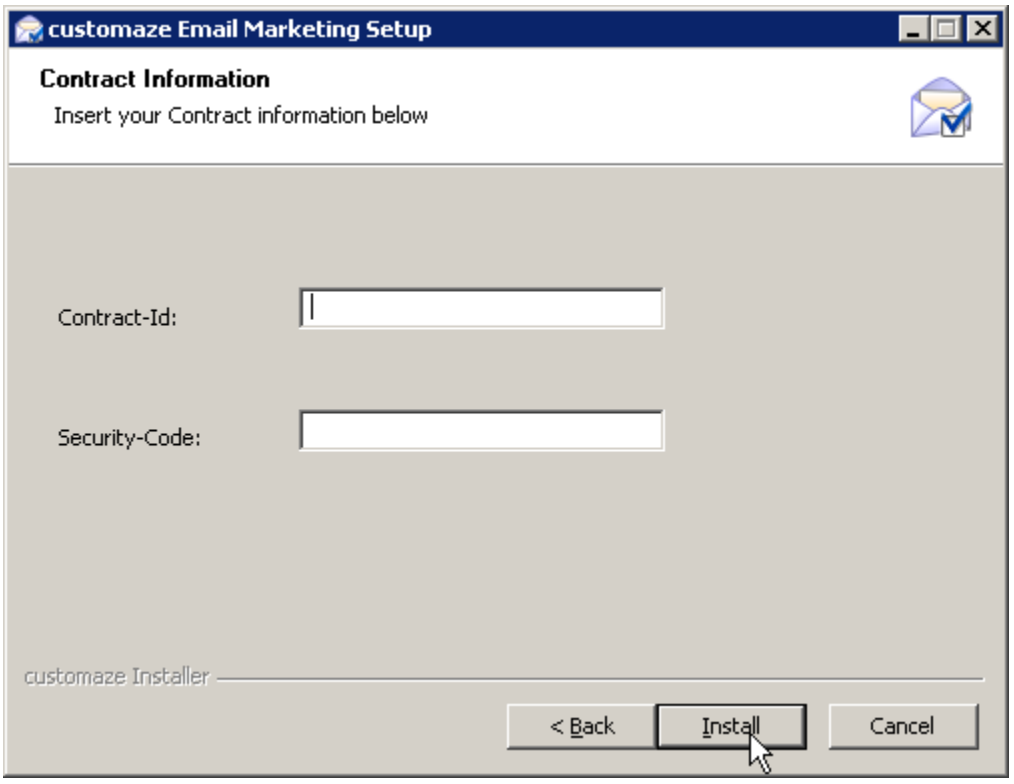
Enter the credentials for the special CRM User which was created in the Pre-Installation Tasks. You cannot use the Service Account under which the CRM is running. Click **Next**


customaze Email Marketing Setup
Select the Organization
Select the Organization where the Add-On is deployed
Please select the Organization to which the Add-On should be deployed from the list below.
If you want to deploy the Add-On to multple Organizations, you can do so after finishing the installation using the configuration utility.
Organization:
crmupEmailMarketing
customaze Installer
< Back
Next >
Cancel

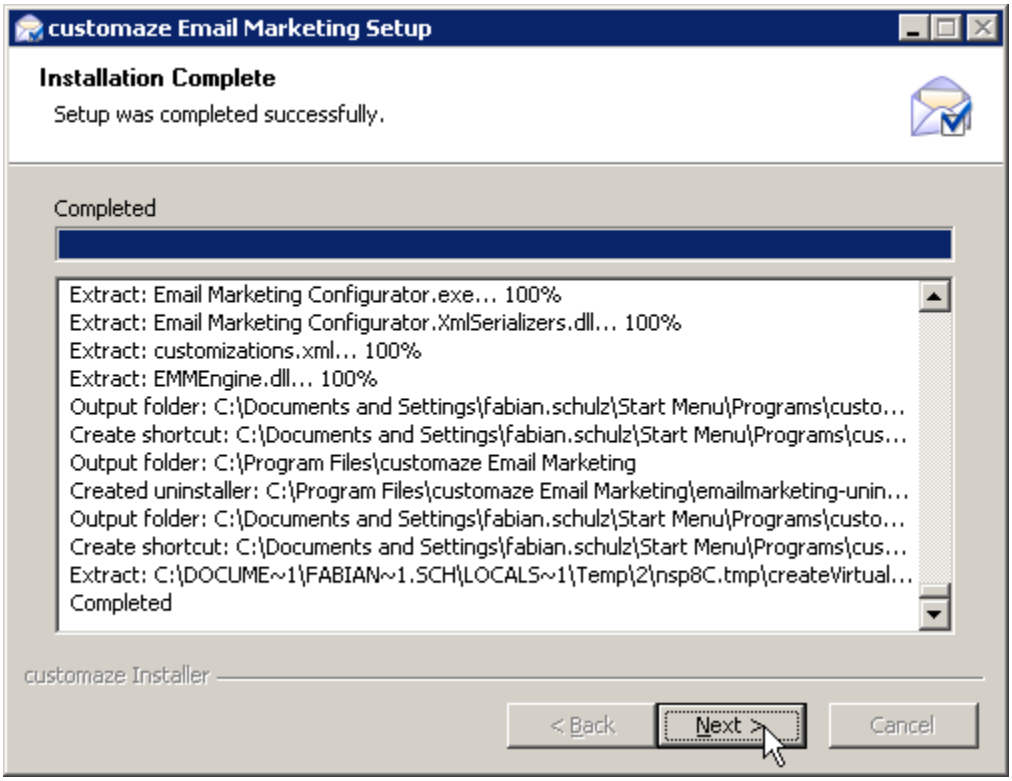
Select the first Organization the Add-On will be deployed to. Further Organizations can be configured later using the configuration utility. Click **Next**



Paste the license data provided to you into this field. Click **Next**

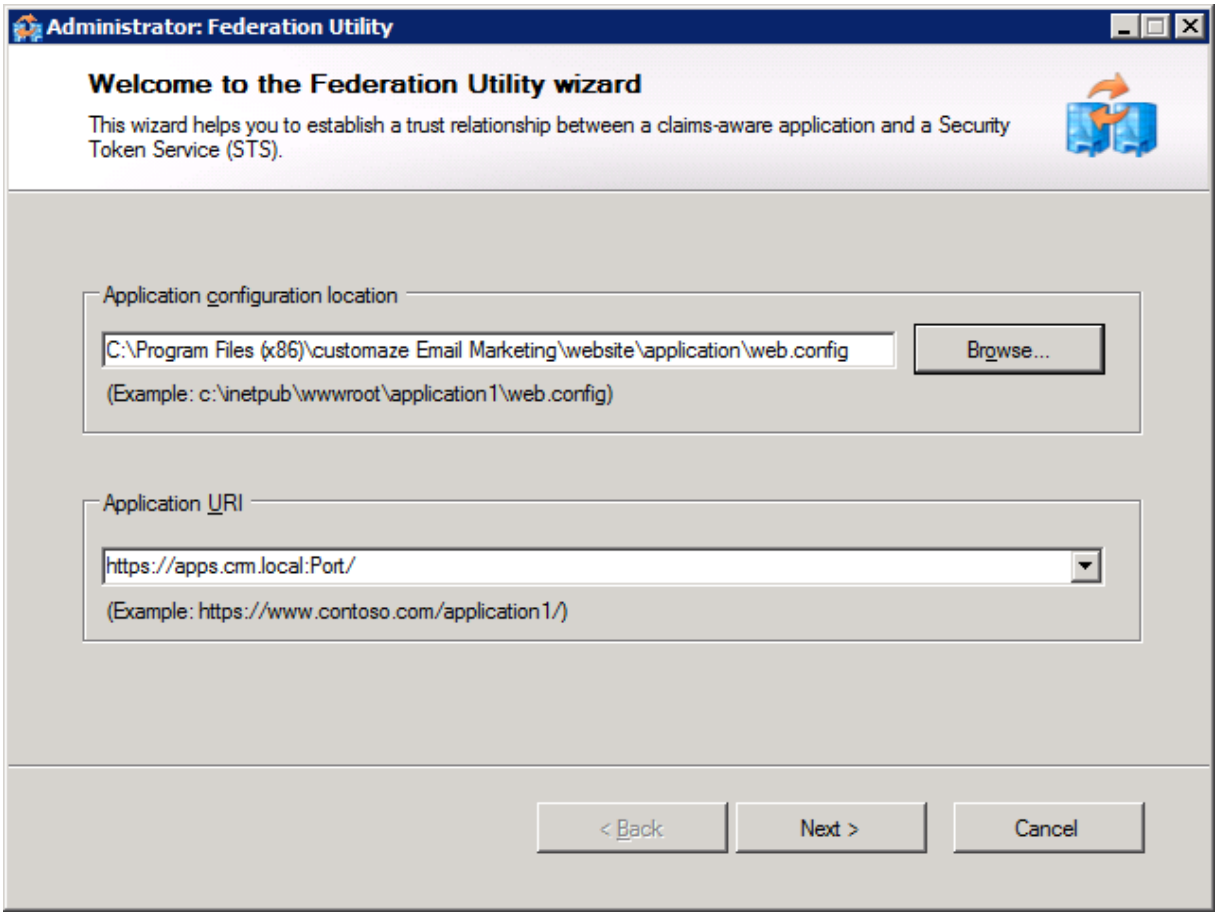


Together with the license data, you should have received a contract id and a security code. Copy and Paste them into the fields. Click **Next**



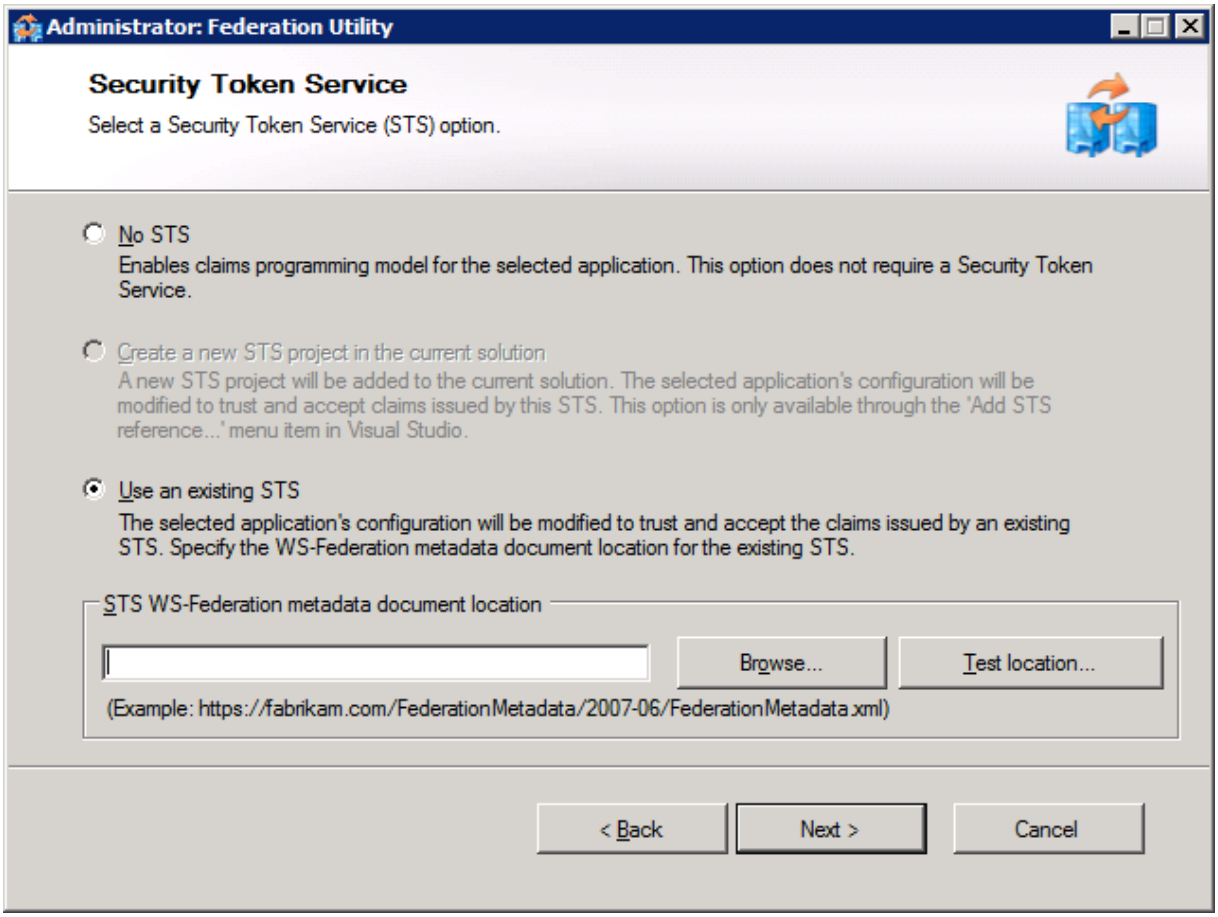
Please wait until the installation is completed. Depending on the speed of your system, this can take a few minutes. Click **Next**

If Claims-Based Authentication is **not** enabled, you can finish the Setup. When Claims-Based Authentication is enabled the Setup will start the Federation Utility.

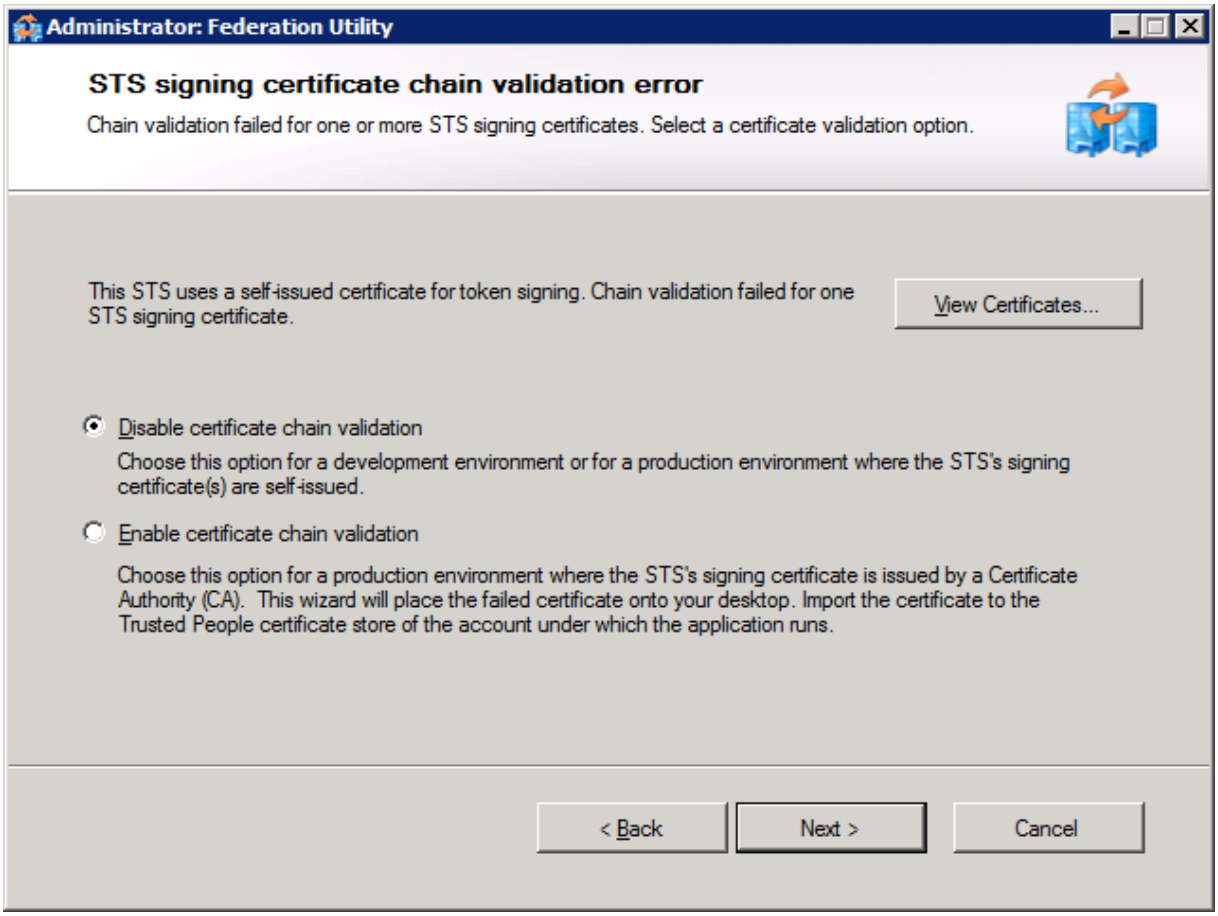

Administrator: Federation Utility
Welcome to the Federation Utility wizard
This wizard helps you to establish a trust relationship between a claims-aware application and a Security Token Service (STS).
Application configuration location
C:\Program Files (x86)\customaze Email Marketing\website\application\web.config
Browse...
(Example: c:\inetpub\wwwroot\application1\web.config)
Application URI
https://apps.crm.local:Port/
(Example: https://www.contoso.com/application1/)
< Back
Next >
Cancel

In the “Application configuration location” Textbox, please enter the path of the “web.config” of customaze Email Marketing. You can find the “web.config” in “$installPath\customaze Email Marketing\website\application\”.

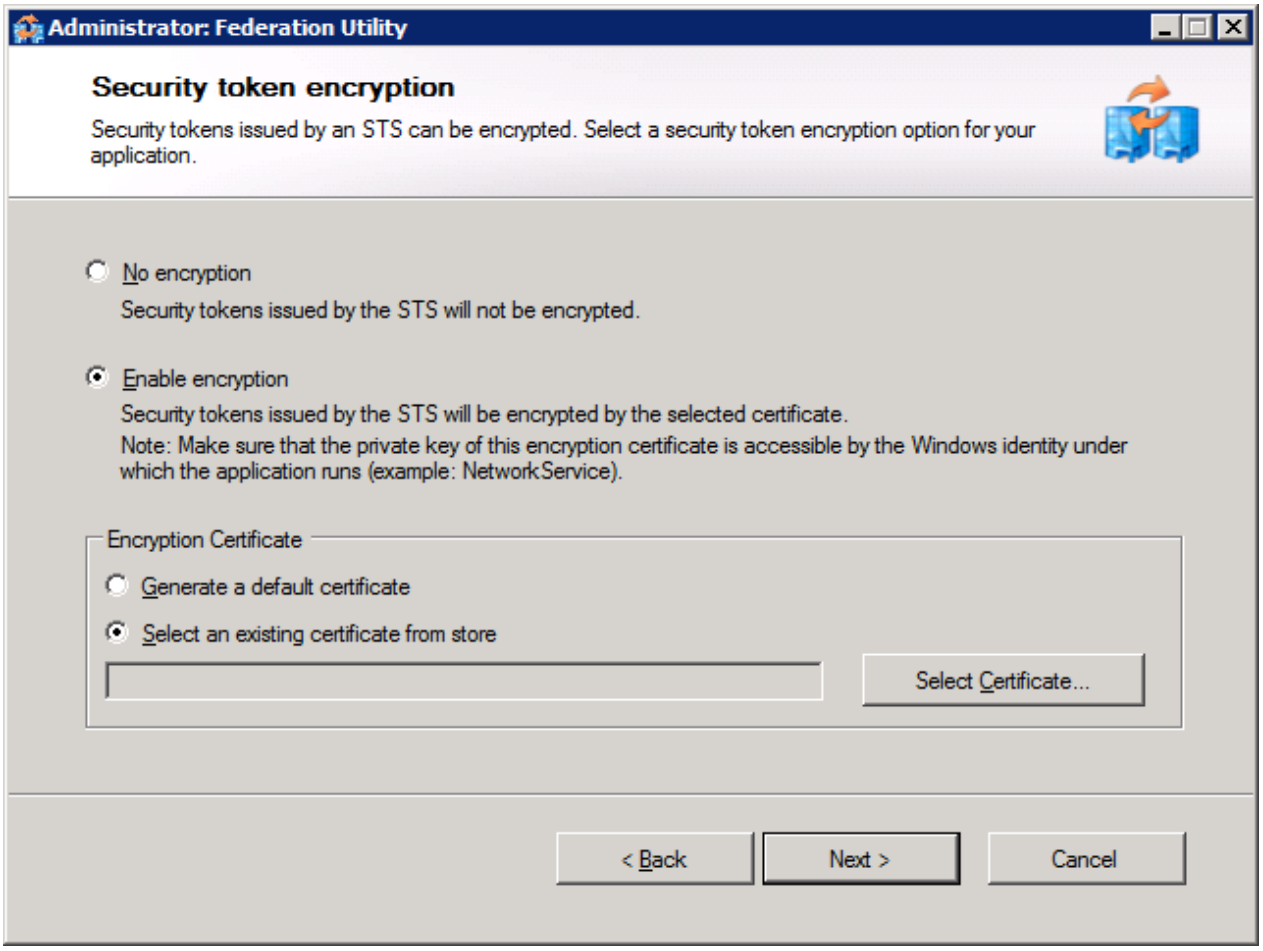
In the “Application URI” Textbox, you have to enter the application URI of the customaze Email Marketing Web page, which you have defined during the Setup. Click **Next**


Administrator: Federation Utility
Security Token Service
Select a Security Token Service (STS) option.
No STS
Enables claims programming model for the selected application. This option does not require a Security Token Service.
Create a new STS project in the current solution
A new STS project will be added to the current solution. The selected application's configuration will be modified to trust and accept claims issued by this STS. This option is only available through the 'Add STS reference...' menu item in Visual Studio.
Use an existing STS
The selected application's configuration will be modified to trust and accept the claims issued by an existing STS. Specify the WS-Federation metadata document location for the existing STS.
STS WS-Federation metadata document location
Browse...
Test location...
(Example: https://fabrikam.com/FederationMetadata/2007-06/FederationMetadata.xml)
< Back
Next >
Cancel

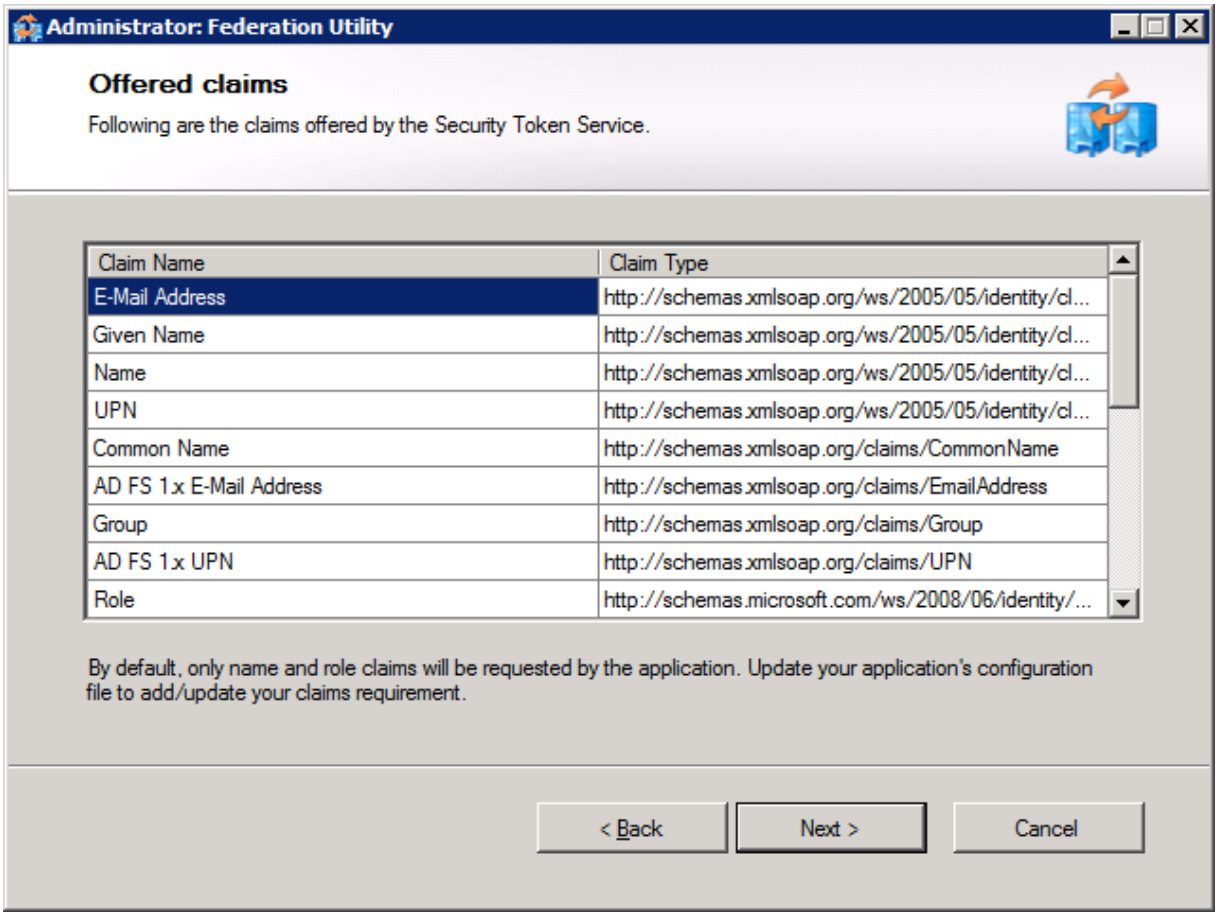
On the Security Token Service page, select “Use an existing STS”, and then enter the location of the federated metadata document. Click **Next**


Administrator: Federation Utility
STS signing certificate chain validation error
Chain validation failed for one or more STS signing certificates. Select a certificate validation option.
This STS uses a self-issued certificate for token signing. Chain validation failed for one STS signing certificate.
View Certificates...
Disable certificate chain validation
Choose this option for a development environment or for a production environment where the STS's signing certificate(s) are self-issued.
Enable certificate chain validation
Choose this option for a production environment where the STS's signing certificate is issued by a Certificate Authority (CA). This wizard will place the failed certificate onto your desktop. Import the certificate to the Trusted People certificate store of the account under which the application runs.
< Back
Next >
Cancel

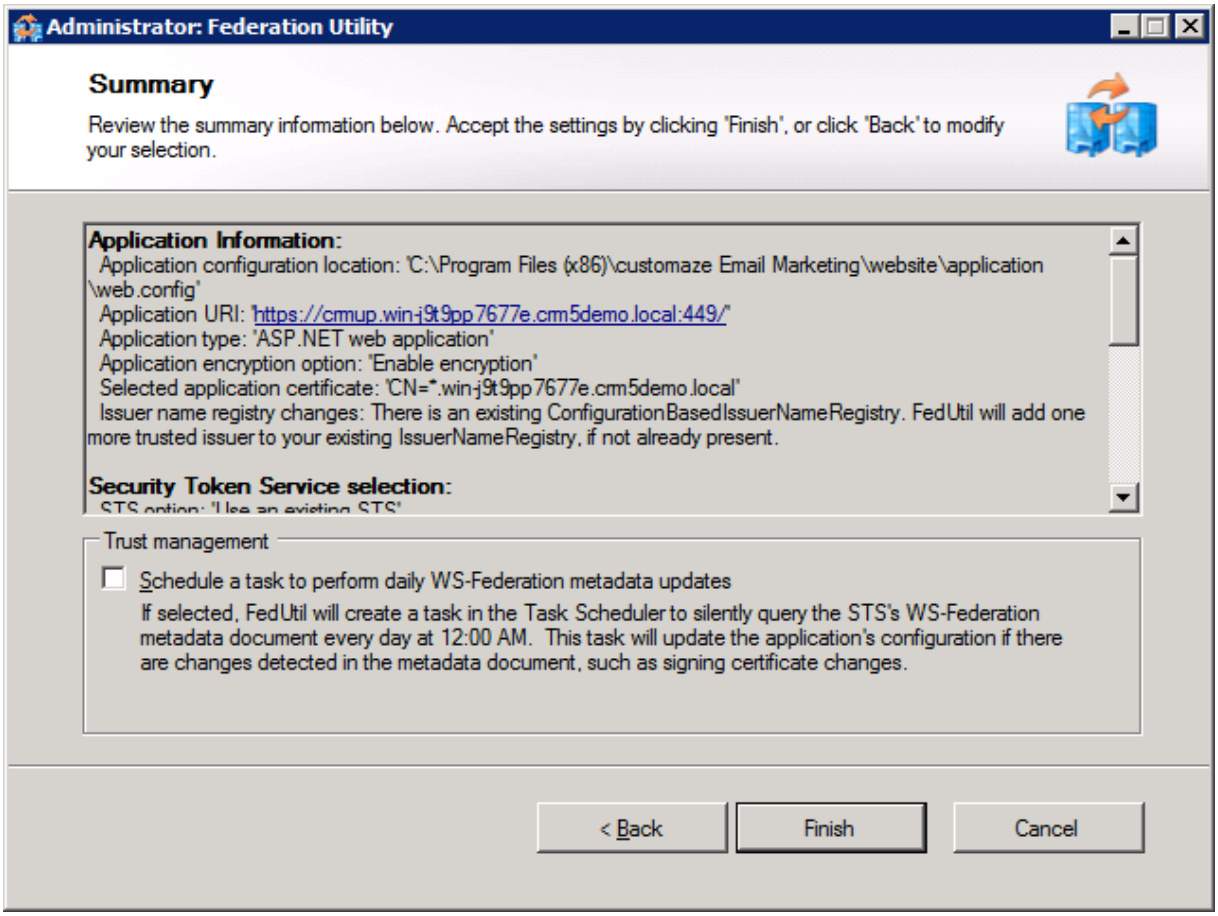
On the STS signing certificate chain validation error page, make any appropriate choice. Click **Next**


Administrator: Federation Utility
Security token encryption
Security tokens issued by an STS can be encrypted. Select a security token encryption option for your application.
No encryption
Security tokens issued by the STS will not be encrypted.
Enable encryption
Security tokens issued by the STS will be encrypted by the selected certificate.
Note: Make sure that the private key of this encryption certificate is accessible by the Windows identity under which the application runs (example: NetworkService).
Encryption Certificate
Generate a default certificate
Select an existing certificate from store
Select Certificate...
< Back
Next >
Cancel

On the Security token encryption page, enable encryption. You must specify the same certificate that was used to configure Microsoft Dynamics CRM 2011. Click **Next**


Administrator: Federation Utility
Offered claims
Following are the claims offered by the Security Token Service.
Claim Name
Claim Type
E-Mail Address
http://schemas.xmlsoap.org/ws/2005/05/identity/cl...
Given Name
http://schemas.xmlsoap.org/ws/2005/05/identity/cl...
Name
http://schemas.xmlsoap.org/ws/2005/05/identity/cl...
UPN
http://schemas.xmlsoap.org/ws/2005/05/identity/cl...
Common Name
http://schemas.xmlsoap.org/claims/CommonName
AD FS 1.x E-Mail Address
http://schemas.xmlsoap.org/claims/EmailAddress
Group
http://schemas.xmlsoap.org/claims/Group
AD FS 1.x UPN
http://schemas.xmlsoap.org/claims/UPN
Role
http://schemas.microsoft.com/ws/2008/06/identity/...
By default, only name and role claims will be requested by the application. Update your application's configuration file to add/update your claims requirement.
< Back
Next >
Cancel

Click **Next**


Administrator: Federation Utility
Summary
Review the summary information below. Accept the settings by clicking 'Finish', or click 'Back' to modify your selection.
Application Information:
Application configuration location: 'C:\Program Files (x86)\customaze Email Marketing\website\application \web.config'
Application URI: 'https://crmup.win-j9t9pp7677e.crm5demo.local:449/'
Application type: 'ASP.NET web application'
Application encryption option: 'Enable encryption'
Selected application certificate: 'CN=*.win-j9t9pp7677e.crm5demo.local'
Issuer name registry changes: There is an existing ConfigurationBasedIssuerNameRegistry. FedUtil will add one more trusted issuer to your existing IssuerNameRegistry, if not already present.
Security Token Service selection:
Trust management
Schedule a task to perform daily WS-Federation metadata updates
If selected, FedUtil will create a task in the Task Scheduler to silently query the STS's WS-Federation metadata document every day at 12:00 AM. This task will update the application's configuration if there are changes detected in the metadata document, such as signing certificate changes.
< Back
Finish
Cancel

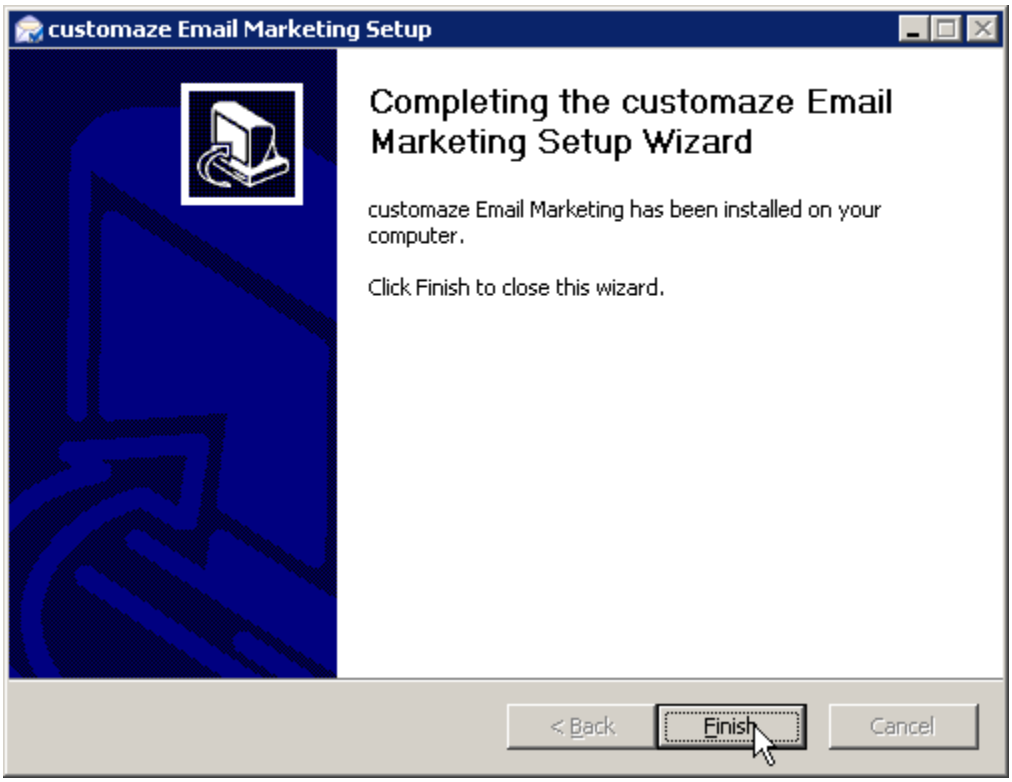
Click **Finish**

Edit Web.Config

You may have to edit the “web.config” of customaze Email Marketing. The “web.config” is located at “$installPath\customaze Email Marketing\website\application\”.

```
<microsoft.identityModel>
  <service>
    <applicationService>
      <claimTypeRequired>
        <claimType type="http://schemas.xmlsoap.org/ws/2005/05/identity/claims/upn" optional="true" />
        <!--Following are the claims offered by STS 'http://sts1.win-j9t9pp7677e.crm5demo.local/adfs/services/trust'
        <claimType type="http://schemas.xmlsoap.org/ws/2005/05/identity/claims/name" optional="true" />
        <claimType type="http://schemas.microsoft.com/ws/2008/06/identity/claims/role" optional="true" />
```

Uncomment the upn claimtype lines and save the changes.


customaze Email Marketing Setup
Completing the customaze Email Marketing Setup Wizard
customaze Email Marketing has been installed on your computer.
Click Finish to close this wizard.
< Back
Finish
Cancel

Click **Finish** to complete the installation.

Post-Installation tasks/Verify the installation

SQL-Server

A common cause for errors during the installation is a problem with the SQL Server permissions.

Please verify that the special CRM User, which was created in the Pre-Installation Tasks, has "db_datareader" and "db_datawriter" permission on every Email Marketing Database.

Service identities

The customaze Distribution Service and customaze Email Reactions Service needs to run under the special CRM User, which was created in the Pre-Installation Tasks.

You need to add that user to the local administrators group as our services need write permissions in the registry.

crmUp App Pool identity

The crmUp application pool in IIS manager needs to use the special user account which was created in the Pre-Installation Tasks.

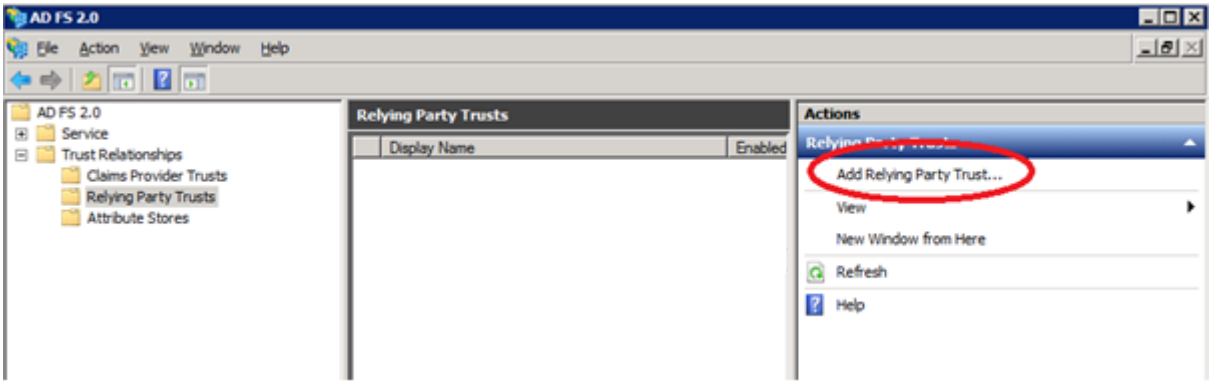
For unknown reasons, setup does not always set the application pool settings to the correct values. Please verify if:

- .NET Framework is set to 4.0
- Managed Pipeline Mode is set to "Integrated"
- Load User Profiles is set to "True"
- Identity is set to use the special user account which was created in the Pre-Installation Tasks.

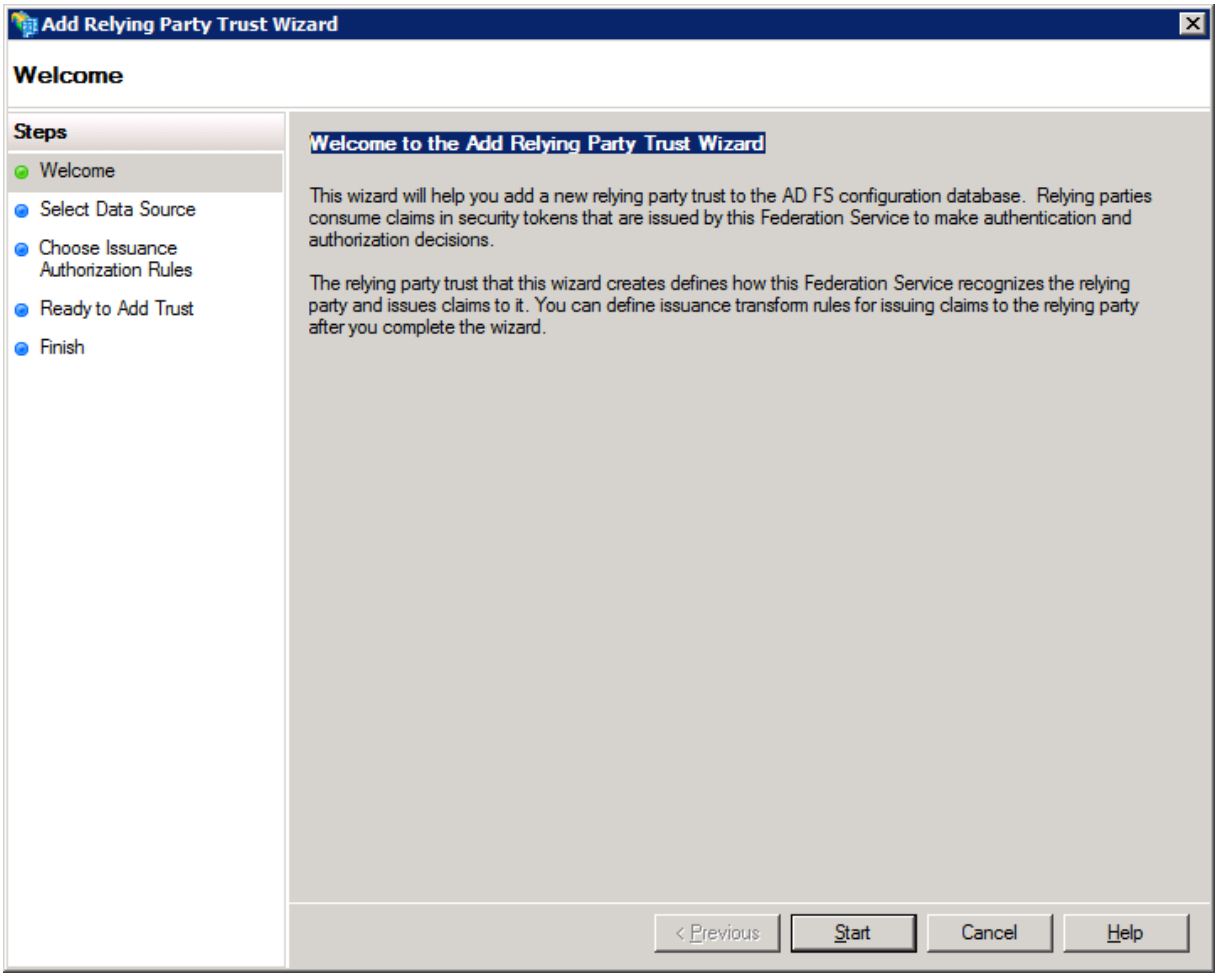
If these settings differ, please correct them manually to the values above.

Establish trust with Email Marketing

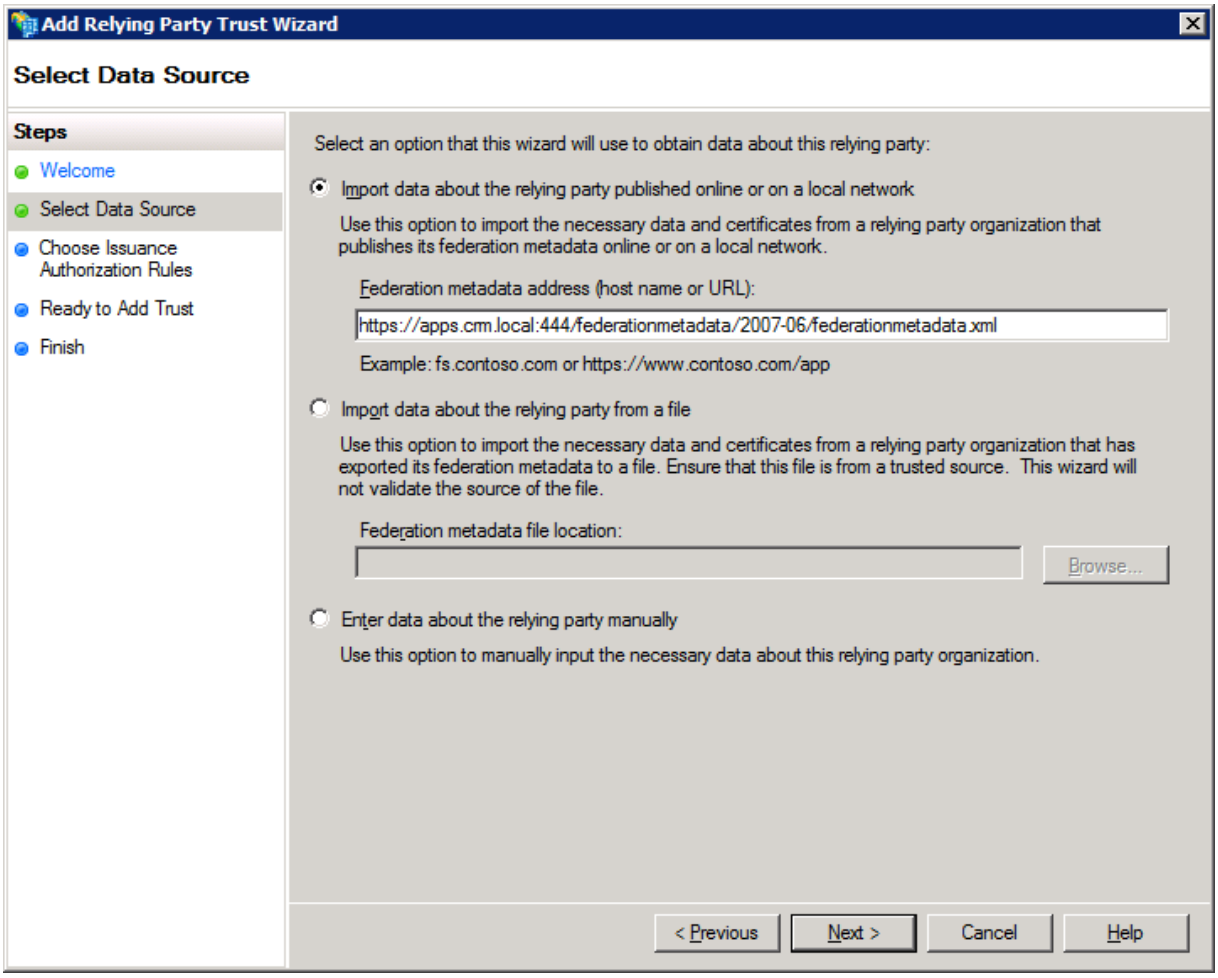
When Claims-Based Authentication is enabled you have to add customaze Email Marketing as Relying Party Trust.



Open your AD FS 2.0 -Server and press "**Add a Relying Party Trust**".

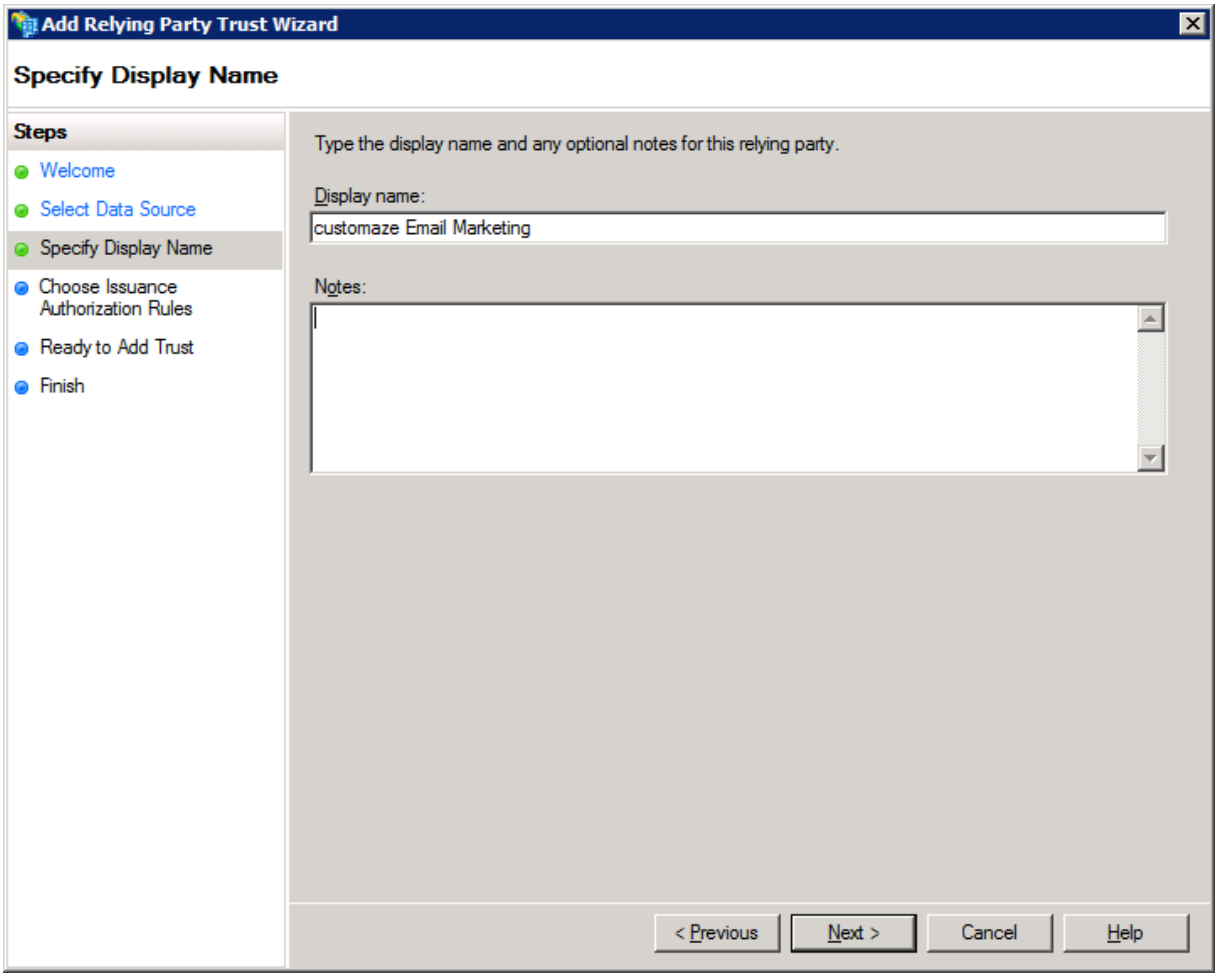

Add Relying Party Trust Wizard
Welcome
Steps
Welcome
Select Data Source
Choose Issuance Authorization Rules
Ready to Add Trust
Finish
Welcome to the Add Relying Party Trust Wizard
This wizard will help you add a new relying party trust to the AD FS configuration database. Relying parties consume claims in security tokens that are issued by this Federation Service to make authentication and authorization decisions.
The relying party trust that this wizard creates defines how this Federation Service recognizes the relying party and issues claims to it. You can define issuance transform rules for issuing claims to the relying party after you complete the wizard.
< Previous
Start
Cancel
Help

On the “Welcome to the Add Relying Party Trust Wizard” click **Start**.

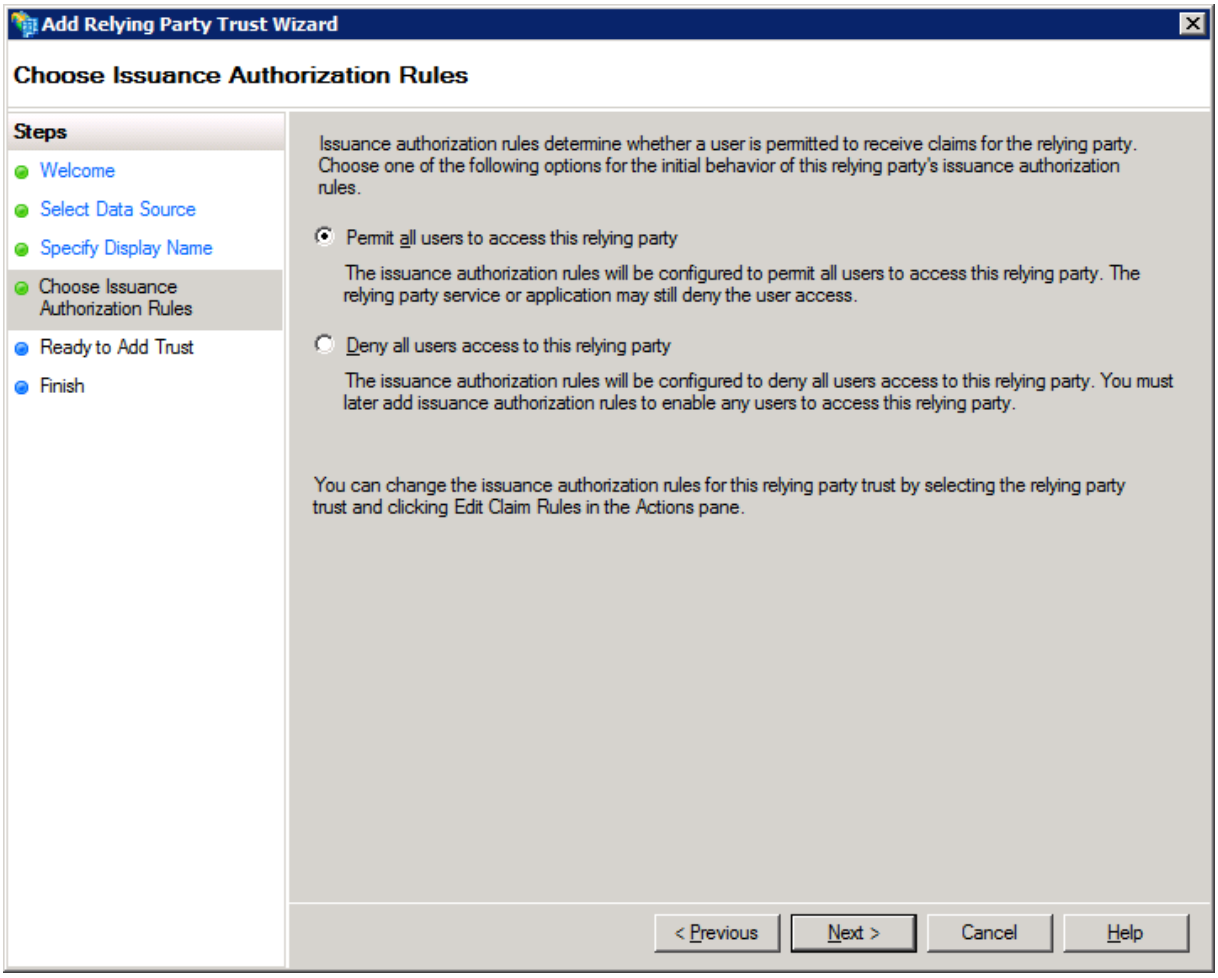

Add Relying Party Trust Wizard
Select Data Source
Steps
Welcome
Select Data Source
Choose Issuance Authorization Rules
Ready to Add Trust
Finish
Select an option that this wizard will use to obtain data about this relying party:
Import data about the relying party published online or on a local network
Use this option to import the necessary data and certificates from a relying party organization that publishes its federation metadata online or on a local network.
Federation metadata address (host name or URL):
https://apps.crm.local:444/federationmetadata/2007-06/federationmetadata.xml
Example: fs.contoso.com or https://www.contoso.com/app
Import data about the relying party from a file
Use this option to import the necessary data and certificates from a relying party organization that has exported its federation metadata to a file. Ensure that this file is from a trusted source. This wizard will not validate the source of the file.
Federation metadata file location:
Browse...
Enter data about the relying party manually
Use this option to manually input the necessary data about this relying party organization.
< Previous
Next >
Cancel
Help

Enter the Federation metadata address from customaze Email Marketing. You have to enter the application URI of the customaze Email Marketing Web page, which you have defined during the Setup plus "/federationmetadata/2007-06/federationmetadata.xml". (e.g. https://apps.crm.local:444/federationmetadata/2007-06/federationmetadata.xml)

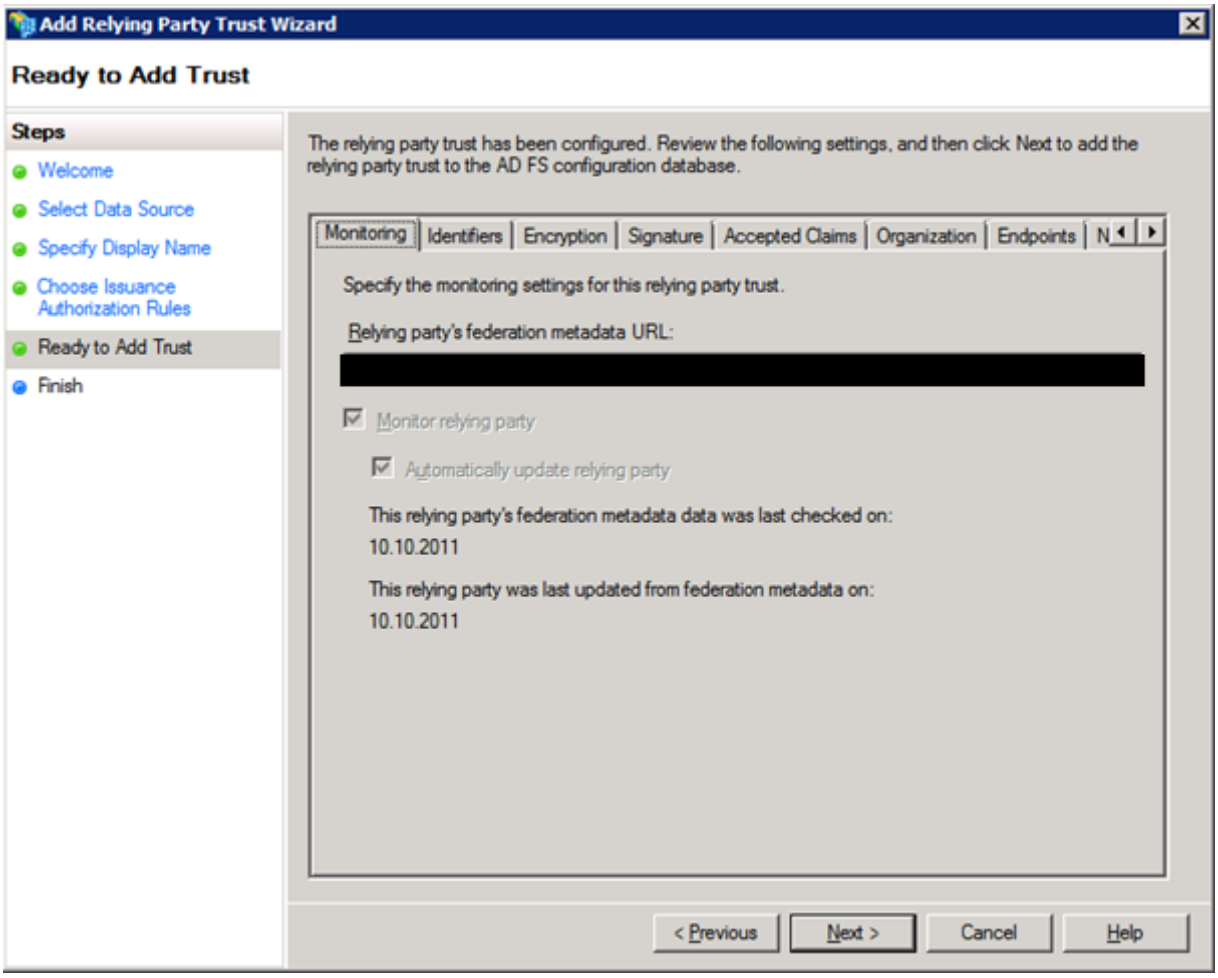
Click **Next**



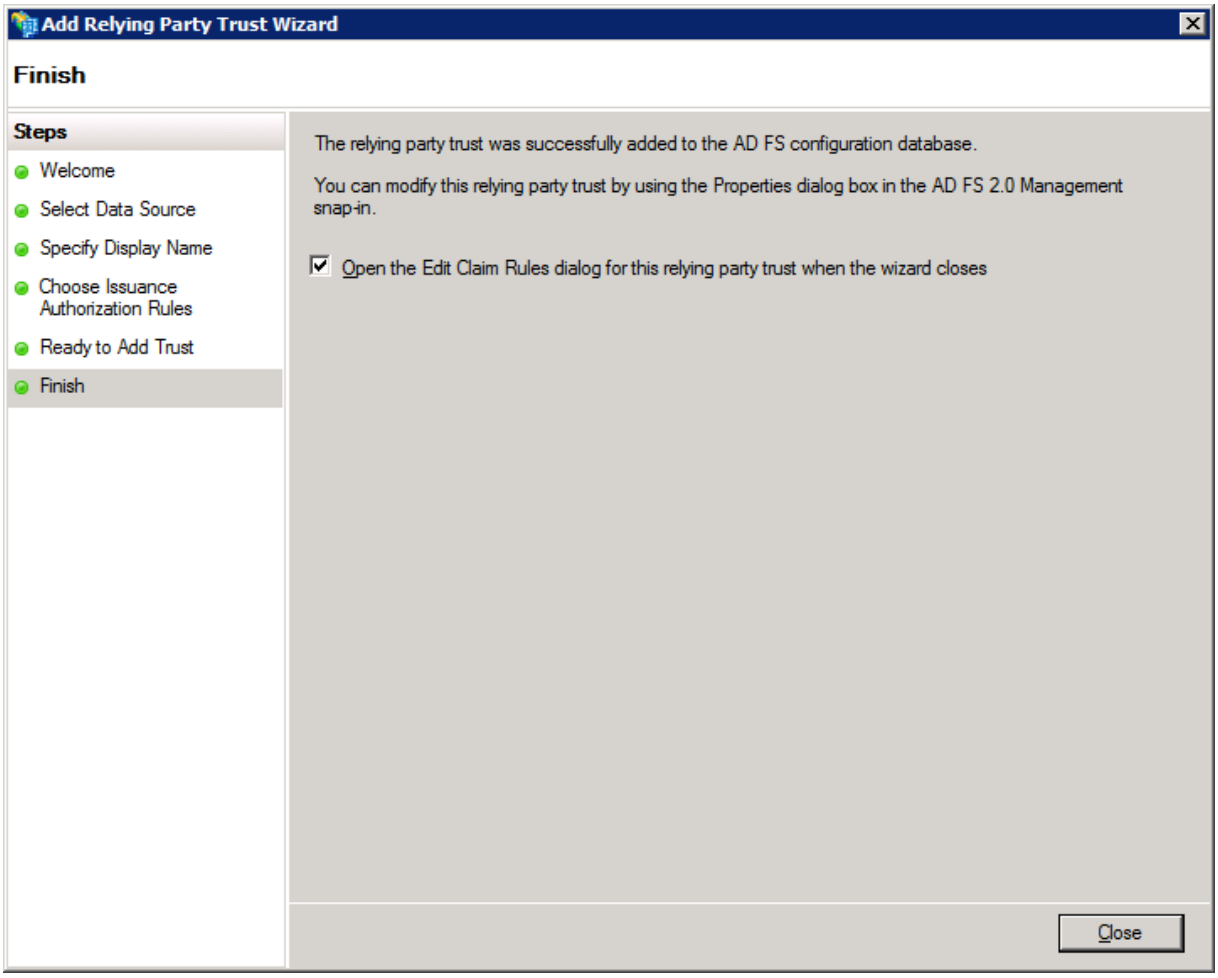
Please enter a suitable Display Name. (e.g. customaze Email Marketing). Click **Next**


Add Relying Party Trust Wizard
Choose Issuance Authorization Rules
Steps
Welcome
Select Data Source
Specify Display Name
Choose Issuance Authorization Rules
Ready to Add Trust
Finish
Issuance authorization rules determine whether a user is permitted to receive claims for the relying party. Choose one of the following options for the initial behavior of this relying party's issuance authorization rules.
Permit all users to access this relying party
The issuance authorization rules will be configured to permit all users to access this relying party. The relying party service or application may still deny the user access.
Deny all users access to this relying party
The issuance authorization rules will be configured to deny all users access to this relying party. You must later add issuance authorization rules to enable any users to access this relying party.
You can change the issuance authorization rules for this relying party trust by selecting the relying party trust and clicking Edit Claim Rules in the Actions pane.
< Previous
Next >
Cancel
Help

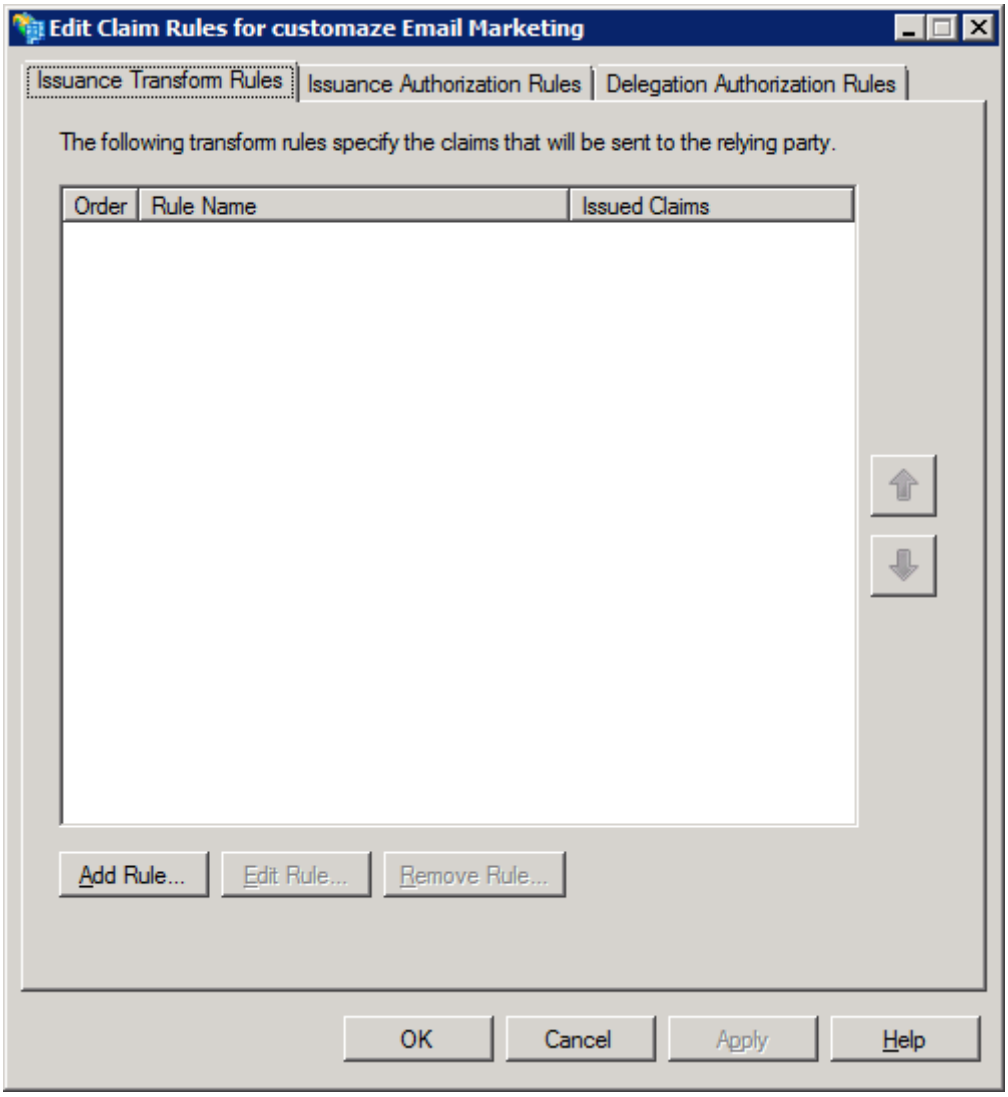
On the Choose Issuance Authorization Rules page, make any appropriate choice. Click **Next**



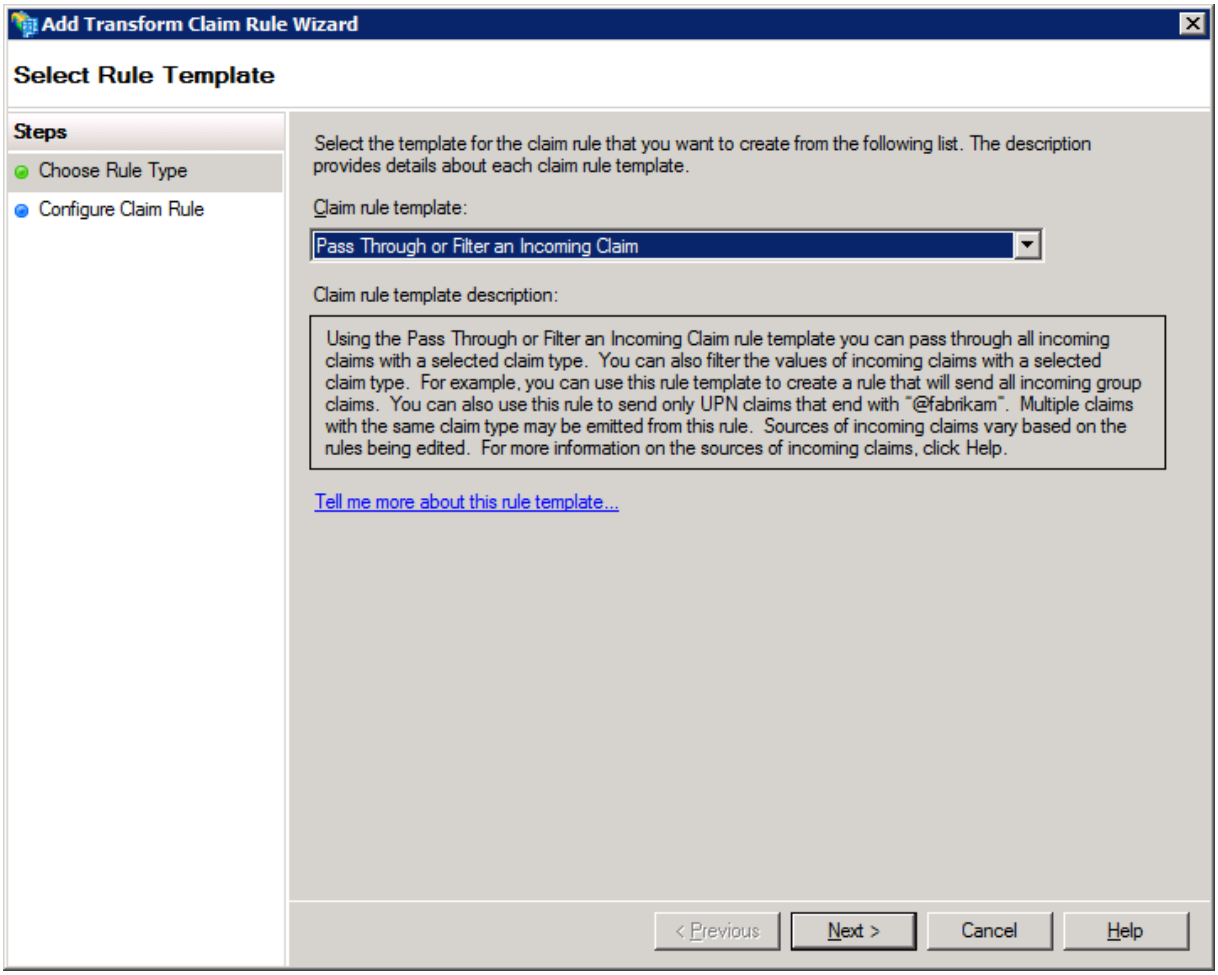
On the ready to Trust site please validate your settings and press next. Click **Next**


Add Relying Party Trust Wizard
Finish
Steps
Welcome
Select Data Source
Specify Display Name
Choose Issuance Authorization Rules
Ready to Add Trust
Finish
The relying party trust was successfully added to the AD FS configuration database.
You can modify this relying party trust by using the Properties dialog box in the AD FS 2.0 Management snap-in.
Open the Edit Claim Rules dialog for this relying party trust when the wizard closes
Close

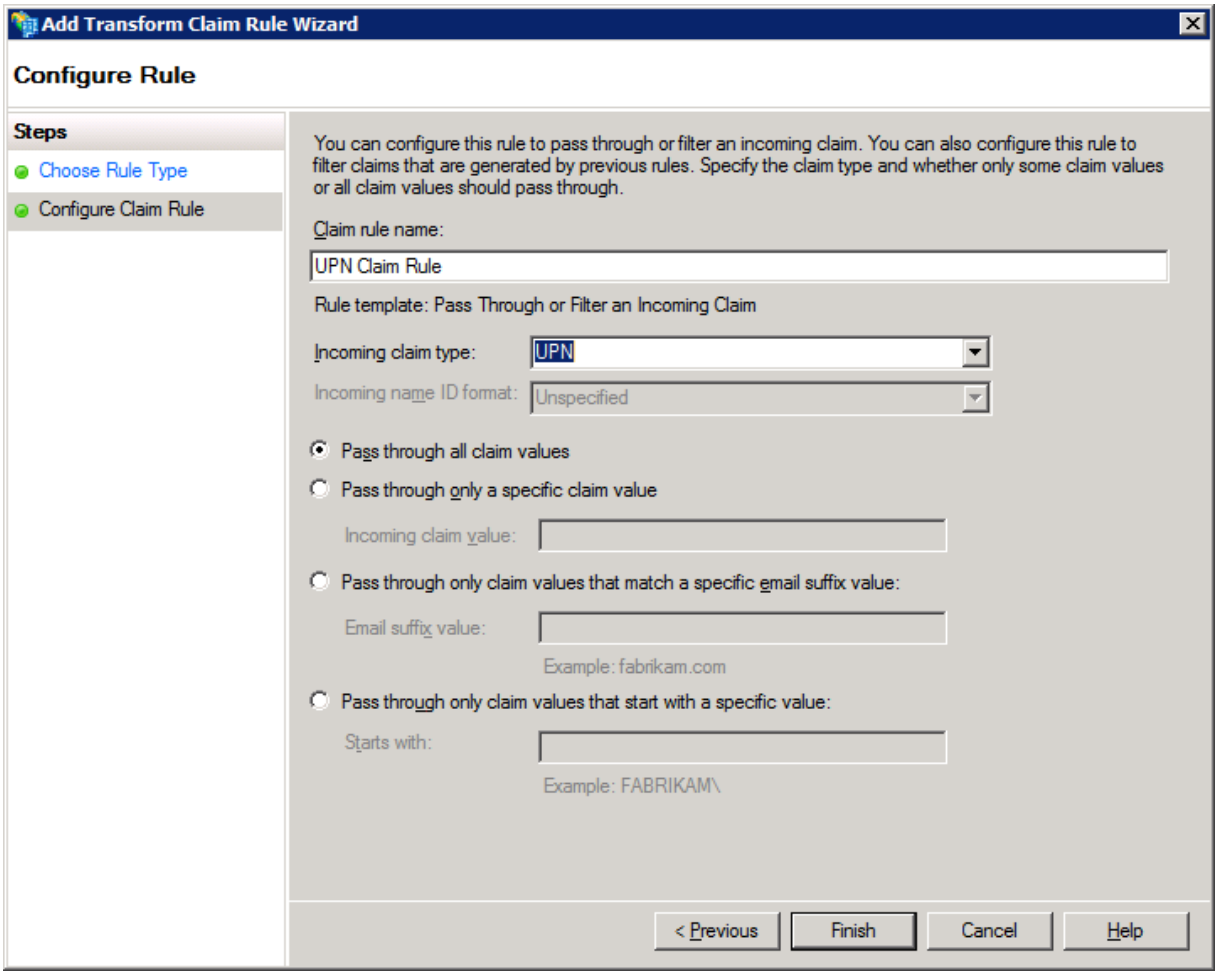
Please mark the check box to launch the "**Edit Claim Rules Dialog**" and press **close**.



Click on the "**Add Rule**" button.


Add Transform Claim Rule Wizard
Select Rule Template
Steps
Choose Rule Type
Configure Claim Rule
Select the template for the claim rule that you want to create from the following list. The description provides details about each claim rule template.
Claim rule template:
Pass Through or Filter an Incoming Claim
Claim rule template description:
Using the Pass Through or Filter an Incoming Claim rule template you can pass through all incoming claims with a selected claim type. You can also filter the values of incoming claims with a selected claim type. For example, you can use this rule template to create a rule that will send all incoming group claims. You can also use this rule to send only UPN claims that end with "@fabrikam". Multiple claims with the same claim type may be emitted from this rule. Sources of incoming claims vary based on the rules being edited. For more information on the sources of incoming claims, click Help.
Tell me more about this rule template...
< Previous
Next >
Cancel
Help

In the Claim rule template list, select the **Pass Through or Filter an Incoming Claim** template, and then click **Next**.

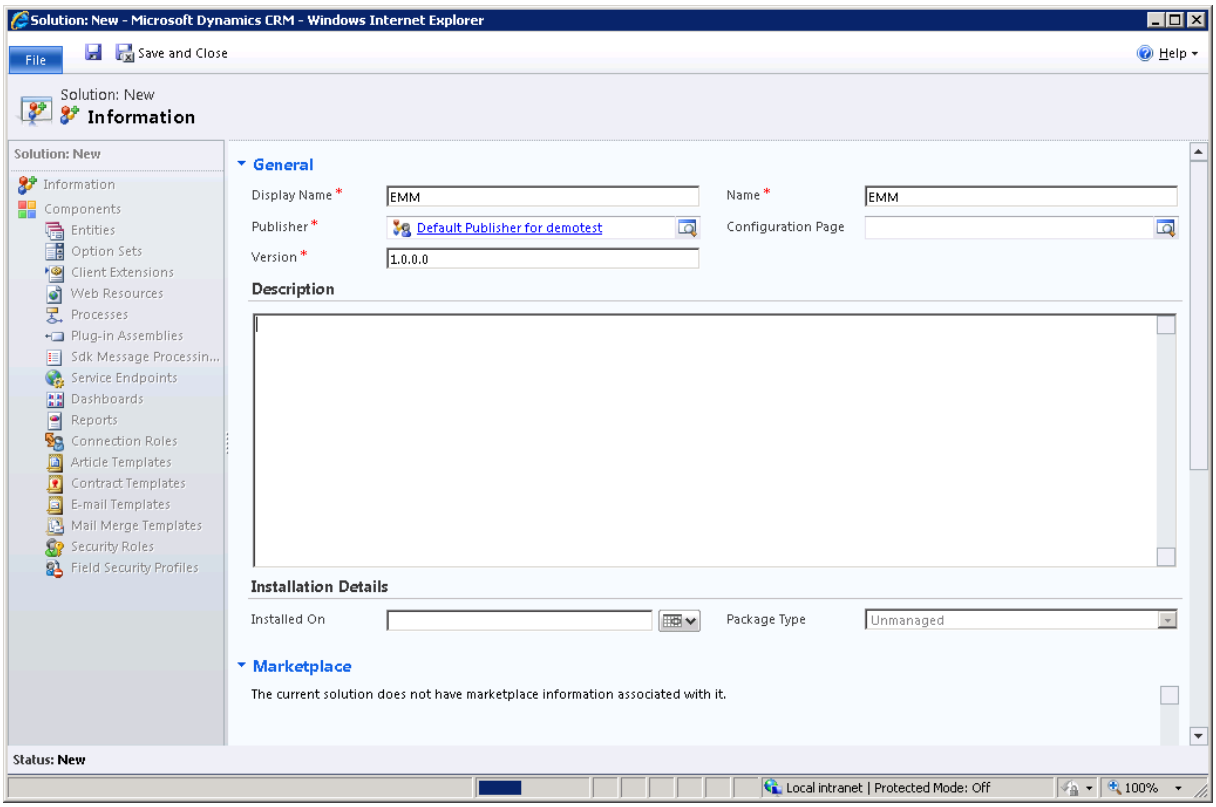

Add Transform Claim Rule Wizard
Configure Rule
Steps
Choose Rule Type
Configure Claim Rule
You can configure this rule to pass through or filter an incoming claim. You can also configure this rule to filter claims that are generated by previous rules. Specify the claim type and whether only some claim values or all claim values should pass through.
Claim rule name:
UPN Claim Rule
Rule template: Pass Through or Filter an Incoming Claim
Incoming claim type:
UPN
Incoming name ID format:
Unspecified
Pass through all claim values
Pass through only a specific claim value
Incoming claim value:
Pass through only claim values that match a specific email suffix value:
Email suffix value:
Example: fabrikam.com
Pass through only claim values that start with a specific value:
Starts with:
Example: FABRIKAM\
< Previous
Finish
Cancel
Help

Please create the rule displayed in the Screenshot and then press **Finish**.

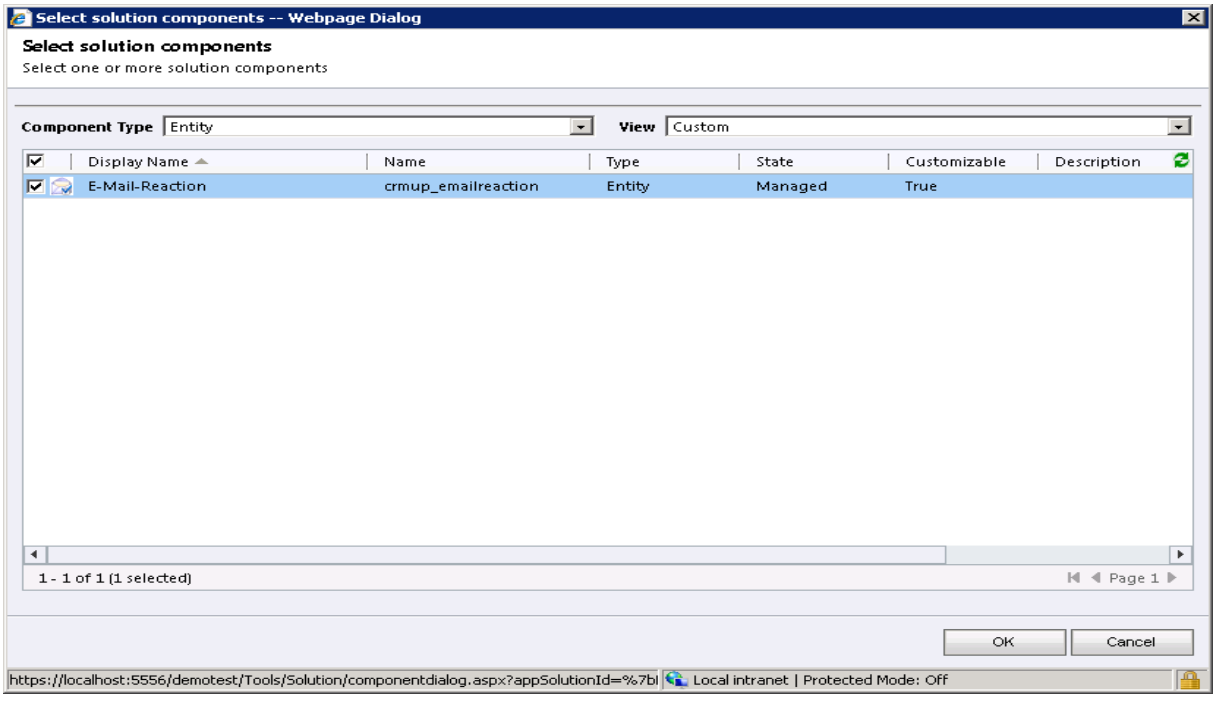
The Setup is now completed. If you cannot access the “customaze Email Marketing Website” please try an “iisreset”. If this not helps, you need to register Email Marketing as a “ServicePrincipalName” (SPN)

Show Email Reactions in the Workplace

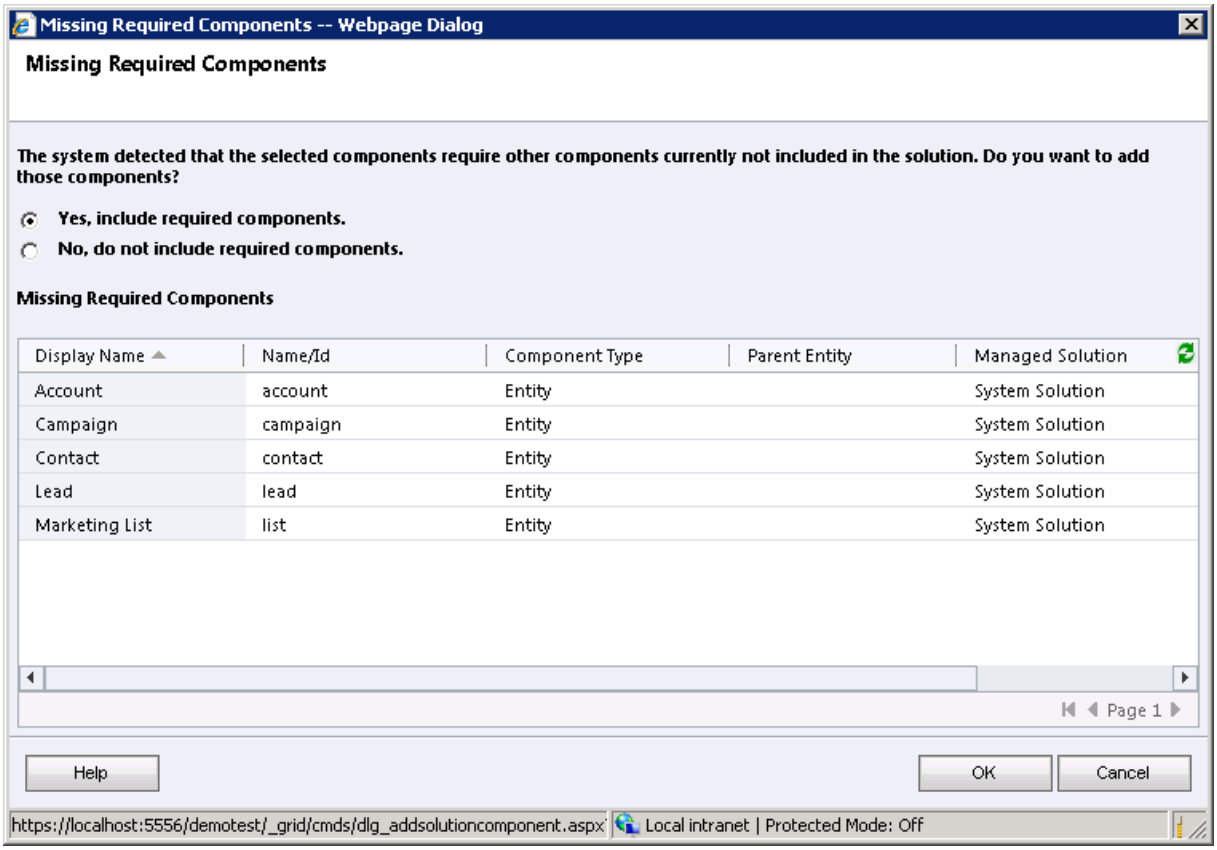
You can show the Email Reactions in the Workplace, this way the CRM users have an easy and convenient way to access that data.



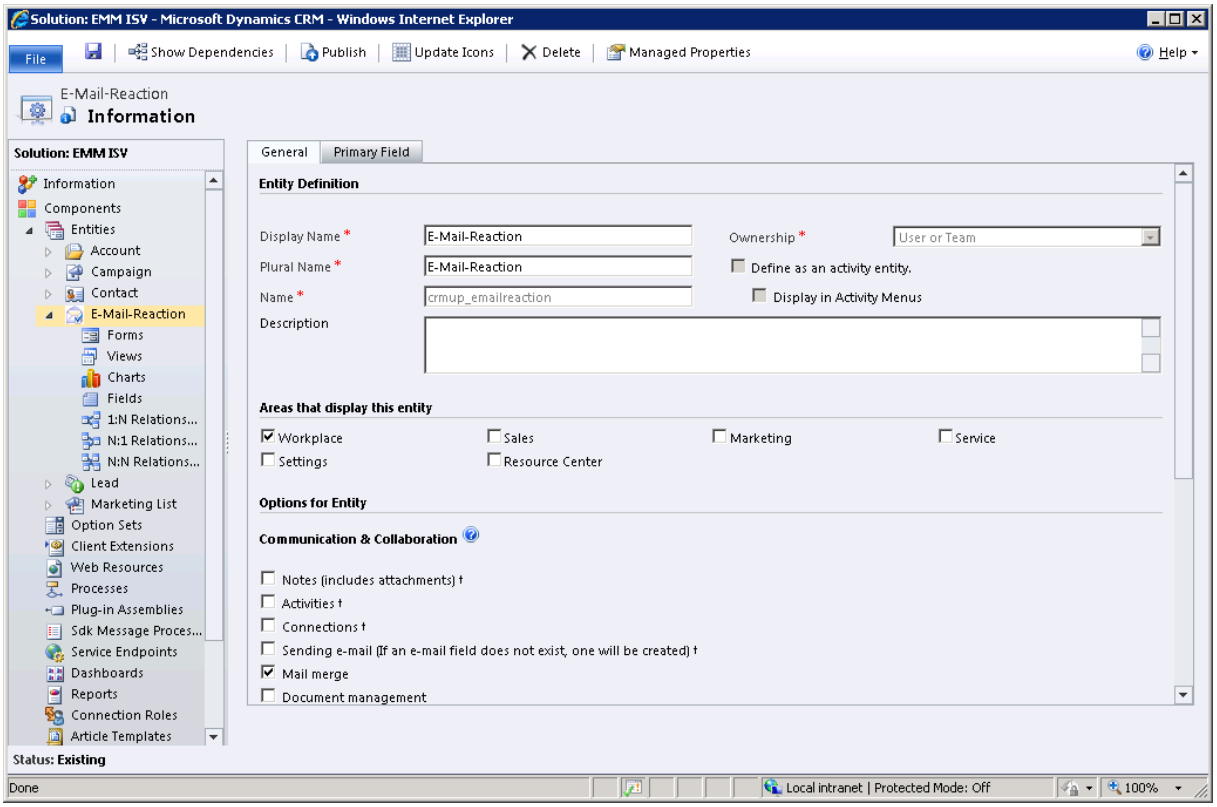
Go to Settings – Solutions – New and enter the required fields and save the form.



Go to “Components” - “ Entities” and press “Add Existing” - select “E-Mail-Reaction” and press okay.



If you get a “Missing Required Components” Webpage Dialog, select “Yes, include required components.”



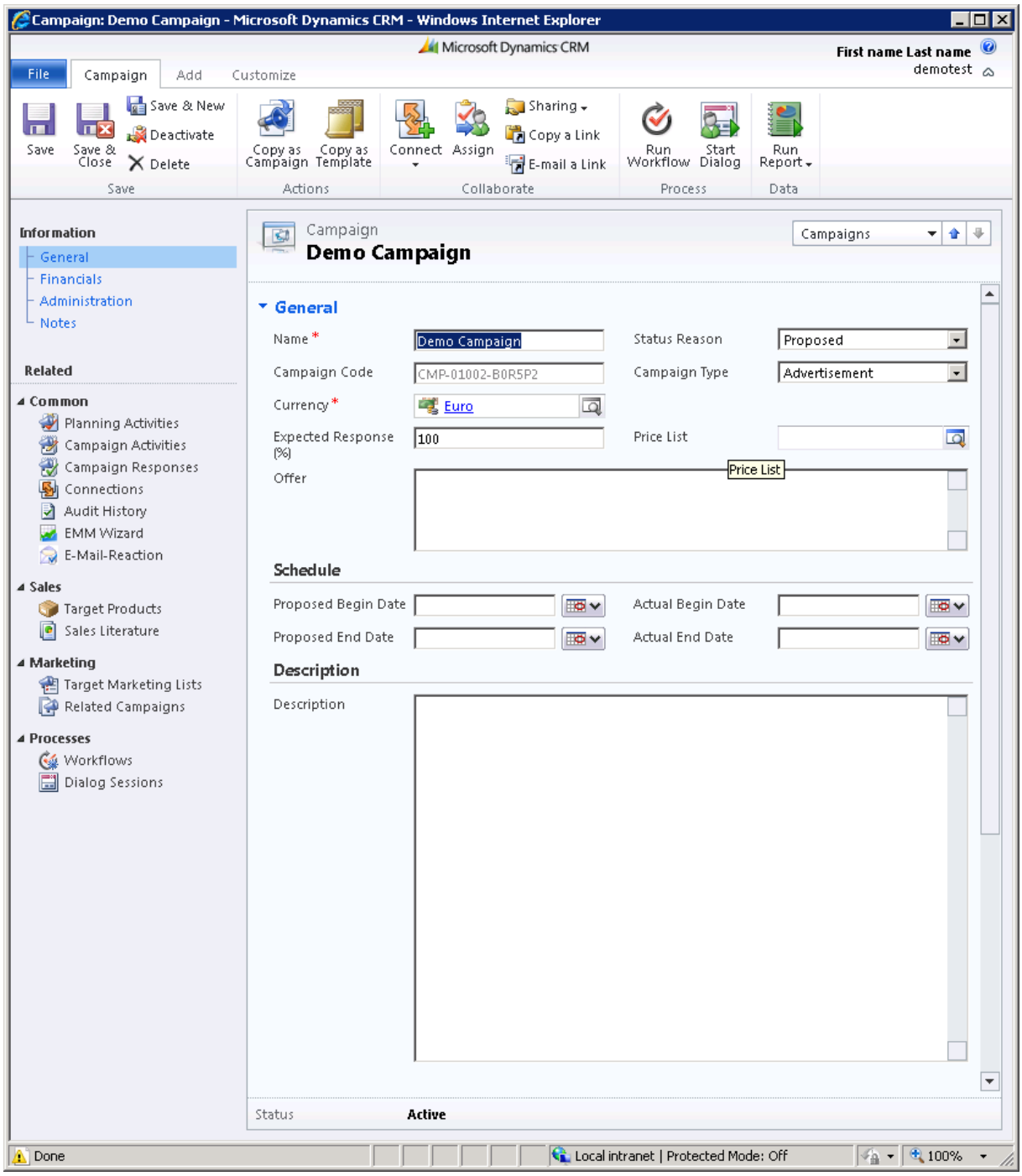
Double click on “E-Mail-Reaction” and check Workplace-Box. Save and publish the changes

Reload the CRM.

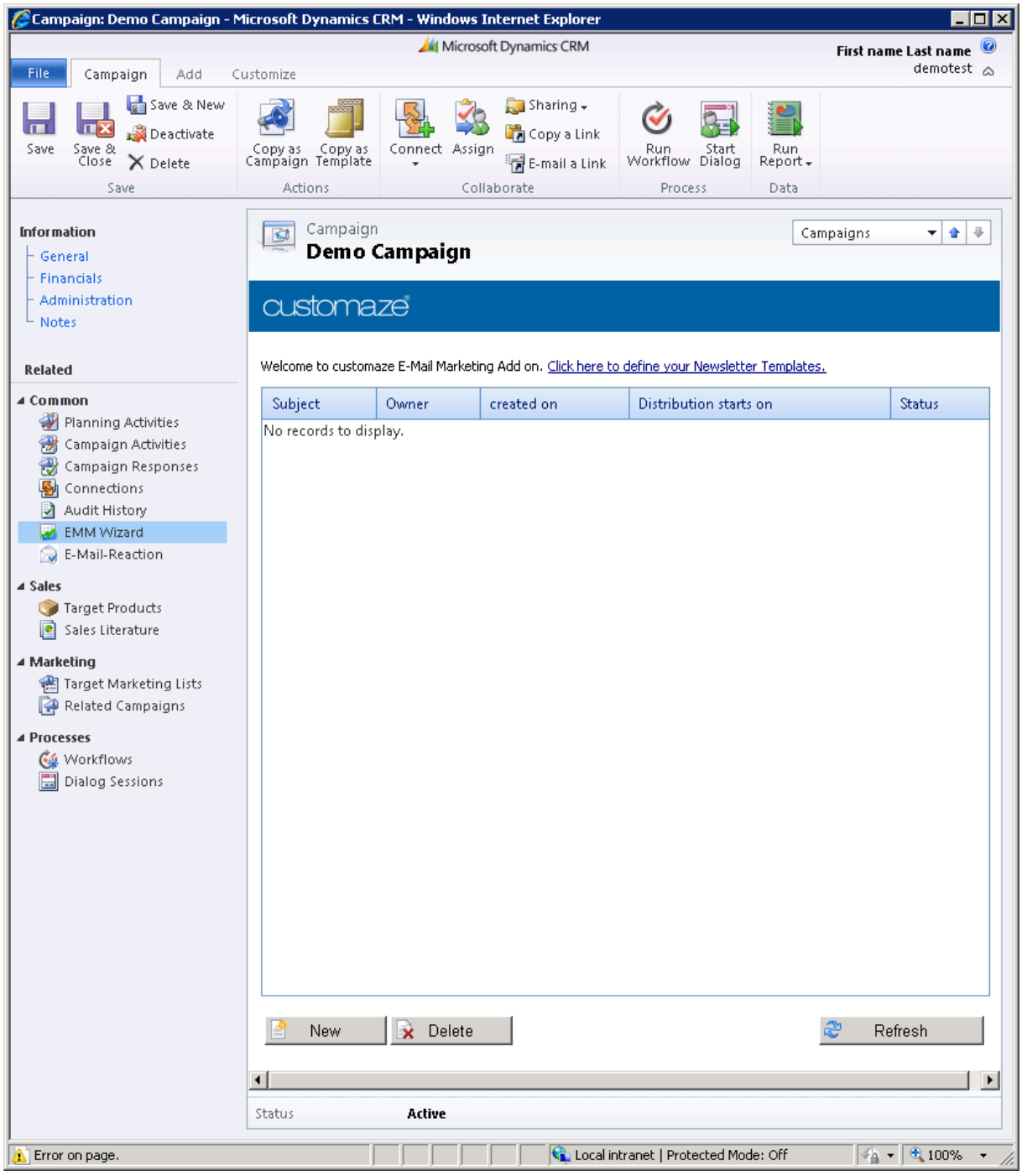
Test the Setup

Once you are done installing everything required, follow these steps to test the installation:

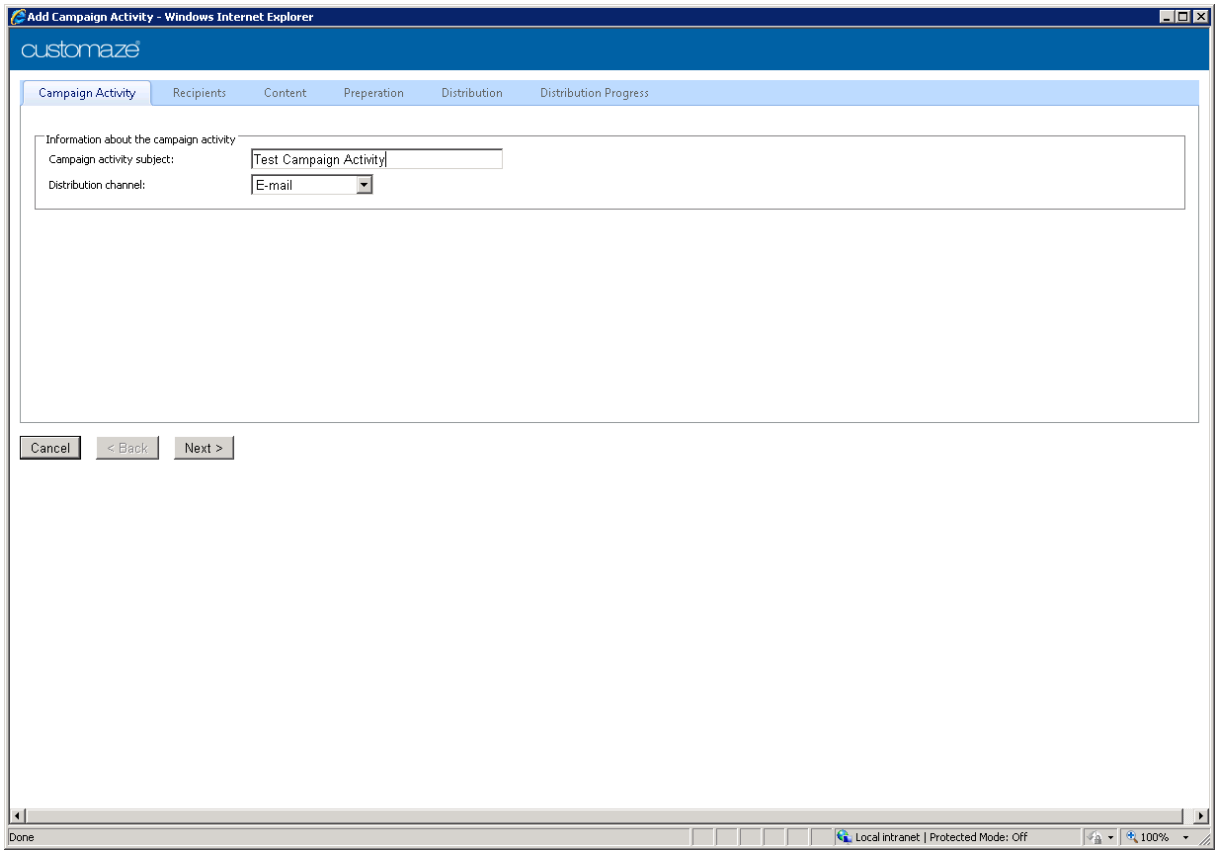
1) Create a new Campaign, enter a name and click Save:



2) Click EMM Wizard in the navigation bar on the left:

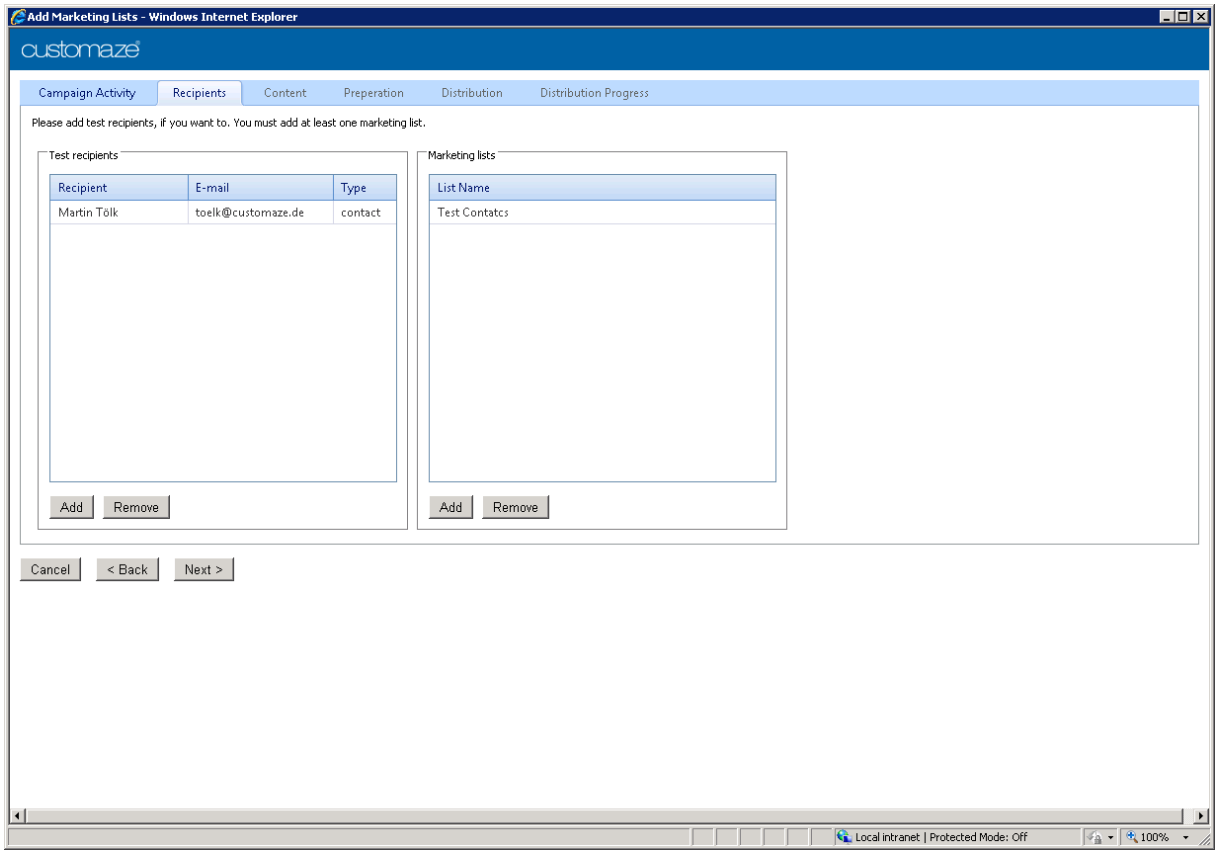


3) Click “New”. A new window should appear. If it doesn’t, please disable your popup blocker and try again:



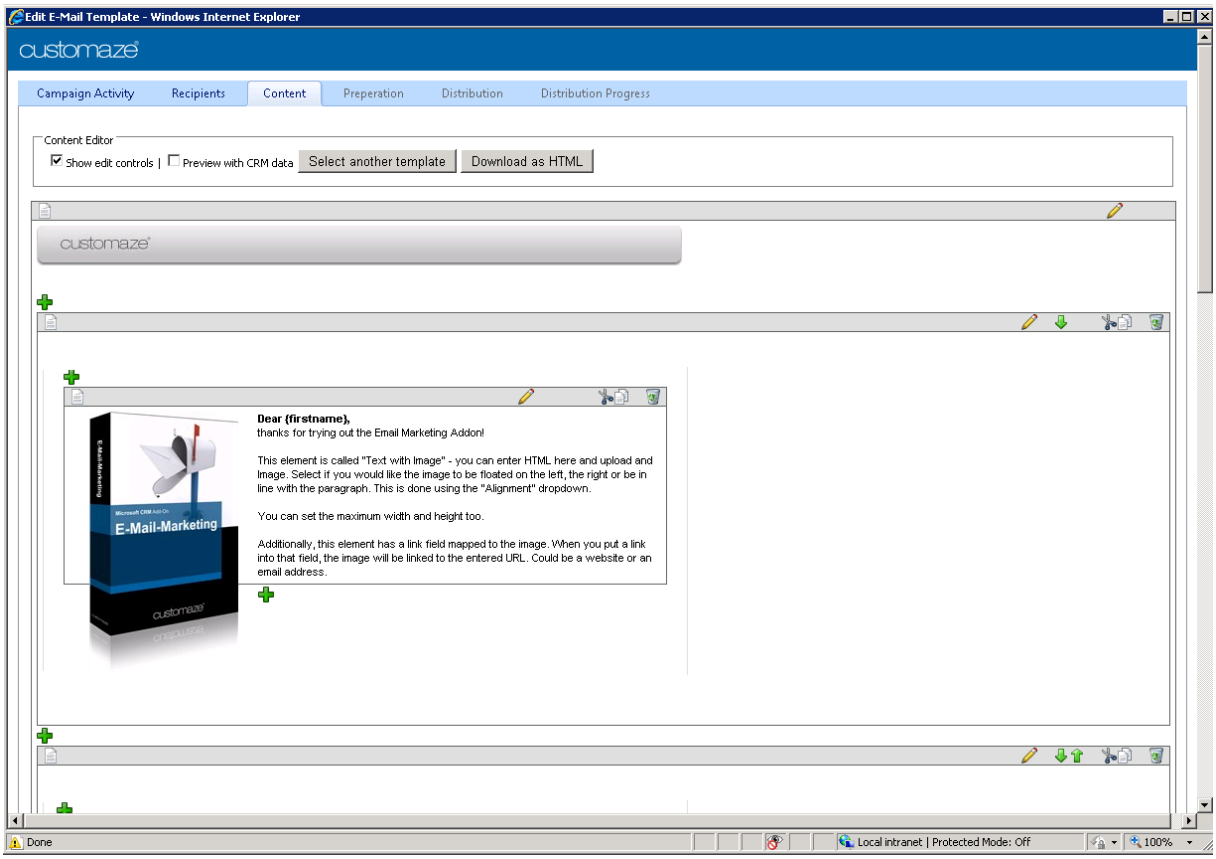
Enter a name for the Campaign Activity and click Next.

4) Add a contact as test recipient and a marketing list:



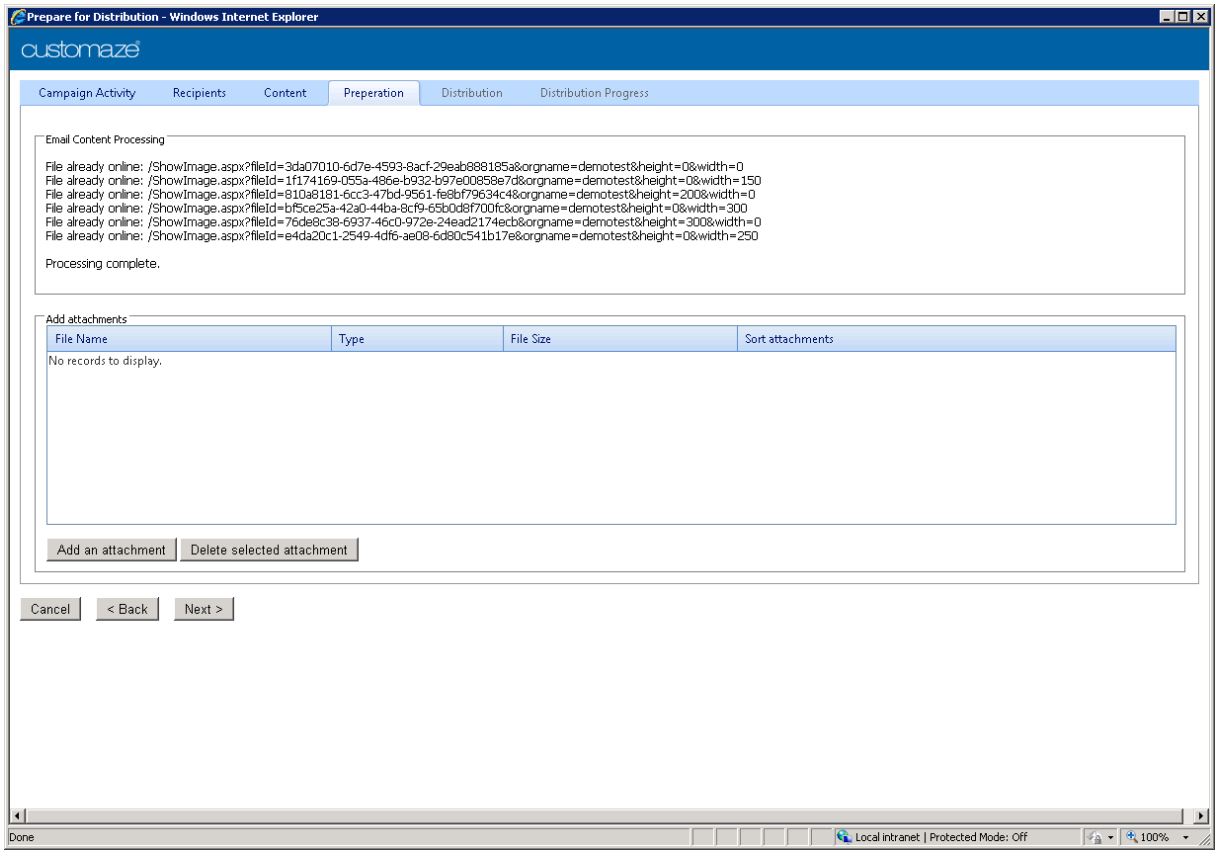
Click Next.

5) Select a template and modify the content to contain a field expression like {firstname} and a hyperlink:


Edit E-Mail Template - Windows Internet Explorer
customaze
Campaign Activity
Recipients
Content
Preperation
Distribution
Distribution Progress
Content Editor
Show edit controls | Preview with CRM data
Select another template
Download as HTML
customaze
Dear {firstname},
thanks for trying out the Email Marketing Addon!
This element is called "Text with Image" - you can enter HTML here and upload and image. Select if you would like the image to be floated on the left, the right or be in line with the paragraph. This is done using the "Alignment" dropdown.
You can set the maximum width and height too.
Additionally, this element has a link field mapped to the image. When you put a link into that field, the image will be linked to the entered URL. Could be a website or an email address.
E-Mail-Marketing
Done
Local intranet | Protected Mode: Off
100%

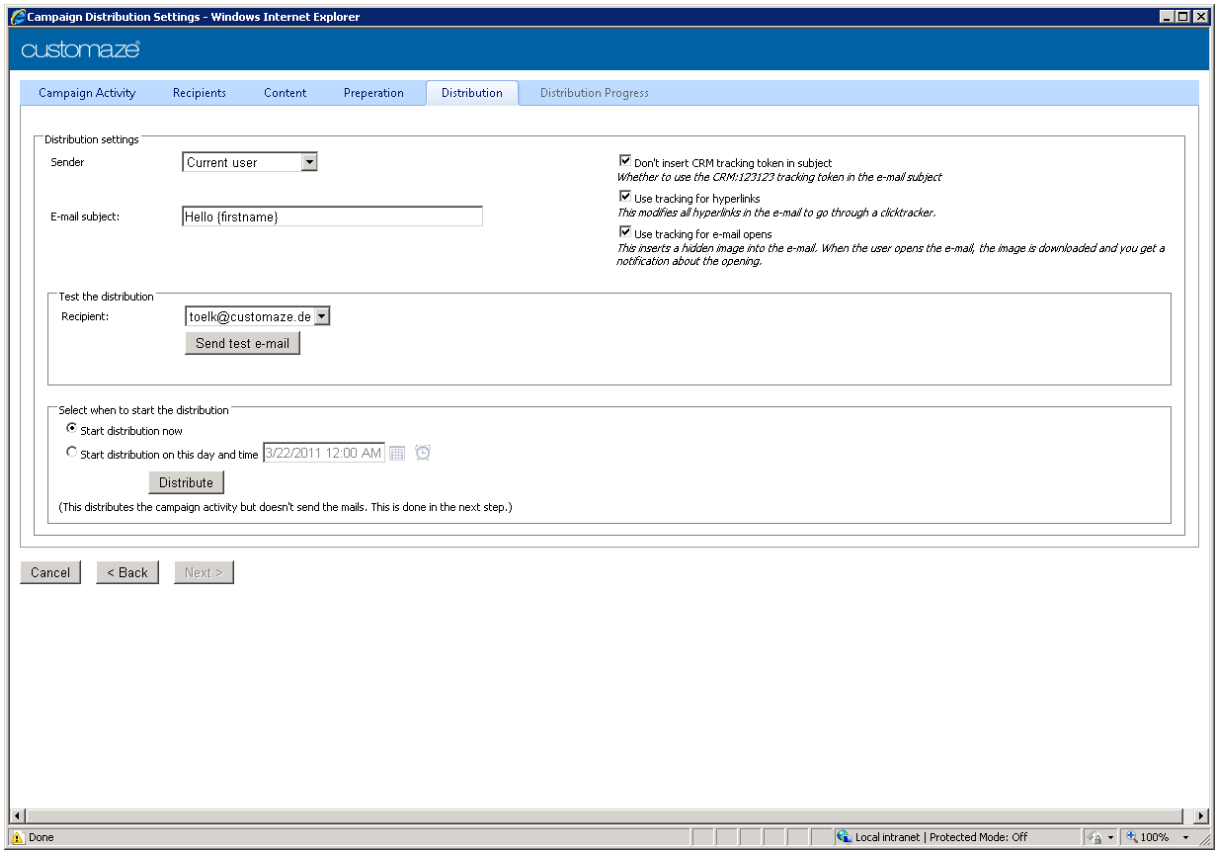
Click Next.

6) The processing page processes the HTML content. The most important modification is the automatic upload of the embedded images to an external server.

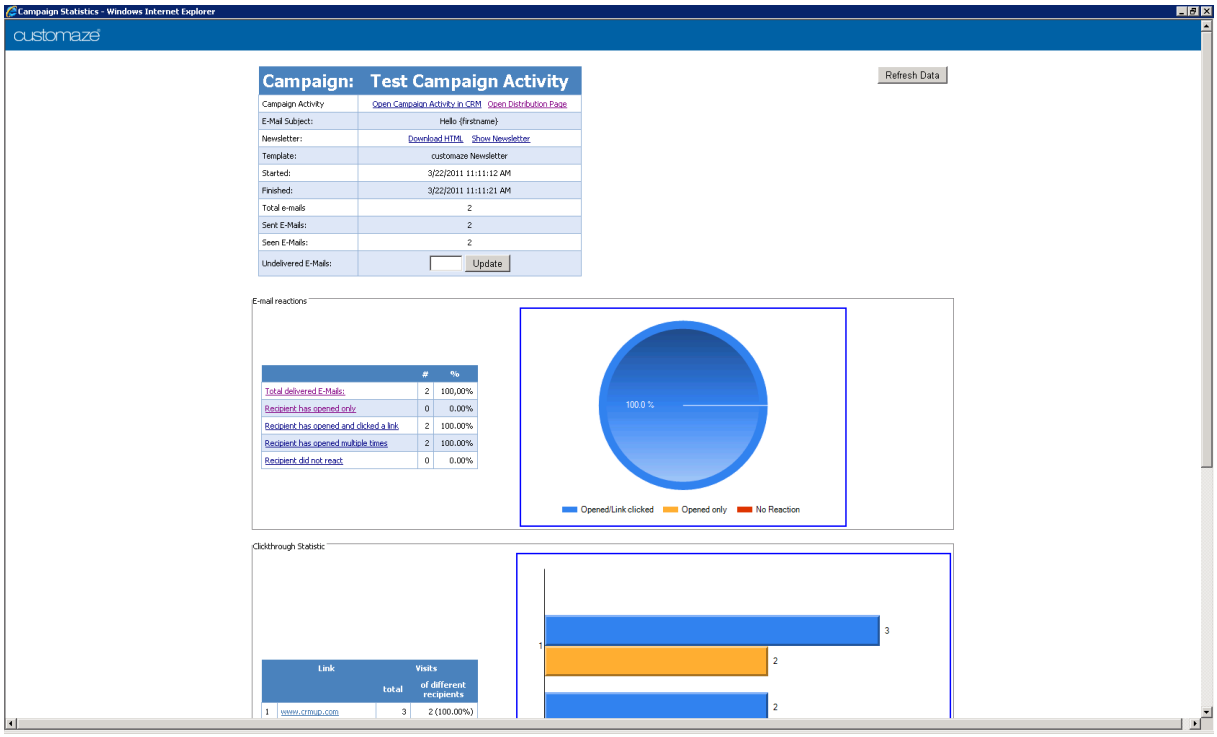


Click Next.

7) On the distribution page, enter an email subject like “Hello {firstname}”, select a test recipient and click “Send Test E-Mail”:


Campaign Distribution Settings - Windows Internet Explorer
customaze
Campaign Activity
Recipients
Content
Preperation
Distribution
Distribution Progress
Distribution settings
Sender
Current user
E-mail subject:
Hello {firstname}
Don't insert CRM tracking token in subject
Whether to use the CRM:123123 tracking token in the e-mail subject
Use tracking for hyperlinks
This modifies all hyperlinks in the e-mail to go through a clicktracker.
Use tracking for e-mail opens
This inserts a hidden image into the e-mail. When the user opens the e-mail, the image is downloaded and you get a notification about the opening.
Test the distribution
Recipient:
toelk@customaze.de
Send test e-mail
Select when to start the distribution
Start distribution now
Start distribution on this day and time
3/22/2011 12:00 AM
Distribute
(This distributes the campaign activity but doesn't send the mails. This is done in the next step.)
Cancel
< Back
Next >
Done
Local intranet | Protected Mode: Off
100%

8) Wait until that email arrives at the test recipient's mailbox. Open the email, choose to download the external images and click the link.
9) Restart the customaze Email Reactions service on the CRM server to force the download of the email reactions.
10) Go to the email reactions (if you followed the instructions above, they should appear in your Workplace) and verify if they have been created correctly.
11) Go back to the Campaign Distribution window and click "Start Distribution". The emails should be created in the CRM and they should be send automatically.
12) When the distribution process has finished, click "Close Acitvity" and then open the statistics (there's a link there for that purpose). They should look like this:



13) If you have arrived here, everything is working fine! We wish you a lot of fun and success with our email marketing solution!

Troubleshooting

If something is not working, please check this list:

1) Does your Organization Name contain blanks?
   There is a known bug in Microsoft CRM causing errors when the Organization Name contains blanks. Modify the Organization name to contain no special characters and restart IIS.

2) Under some circumstances you receive an error when you try to import the Email Marketing Solution.
   a. Please verify that the login user and the "crmupAppPool" User has the "Deployment Administrator "Role assigned
   b. If the problem still exist please apply the following KB-Article:
   http://support.microsoft.com/kb/2705840

3) Does The User, under which the crmupAppPool runs, have "db_databasereader" and "db_databasewriter" permissions on every Email Marketing Database?

4) The Event Viewer shows a lot of errors form the customazeDistributionService and/or customazeEmailReactionsService containing: "The request failed with HTTP status 401: Unauthorized". Please check that the service runs as the same User under which the "crmupAppPool" runs.

5) Under some circumstances you receive an error when accessing customaze History which is equal to "**Could Not Load Type 'System.ServiceModel.Activation.HttpModule'**"

   - This error can occur when IIS is installed after installing .NET Framework 4, or if the 3.0 version of the WCF Http Activation module is installed after installing IIS and .NET Framework 4.
   - To resolve this problem, you must use the ASP.NET IIS Registration Tool (Aspnet_regiis.exe,) to register the correct version of ASP.NET. This can be accomplished by using the –iru parameters when running aspnet_regiis.exe as follows:
   - aspnet_regiis.exe -iru
   - aspnet_regiis.exe is located at %SystemRoot%\Microsoft.NET\Framework64\v4.0.21006

6) AD FS 2.1 has a known bug which prevents SDK calls from working. Please apply the following KB-Article:
   http://support.microsoft.com/kb/2828015

Web Designer's Manual

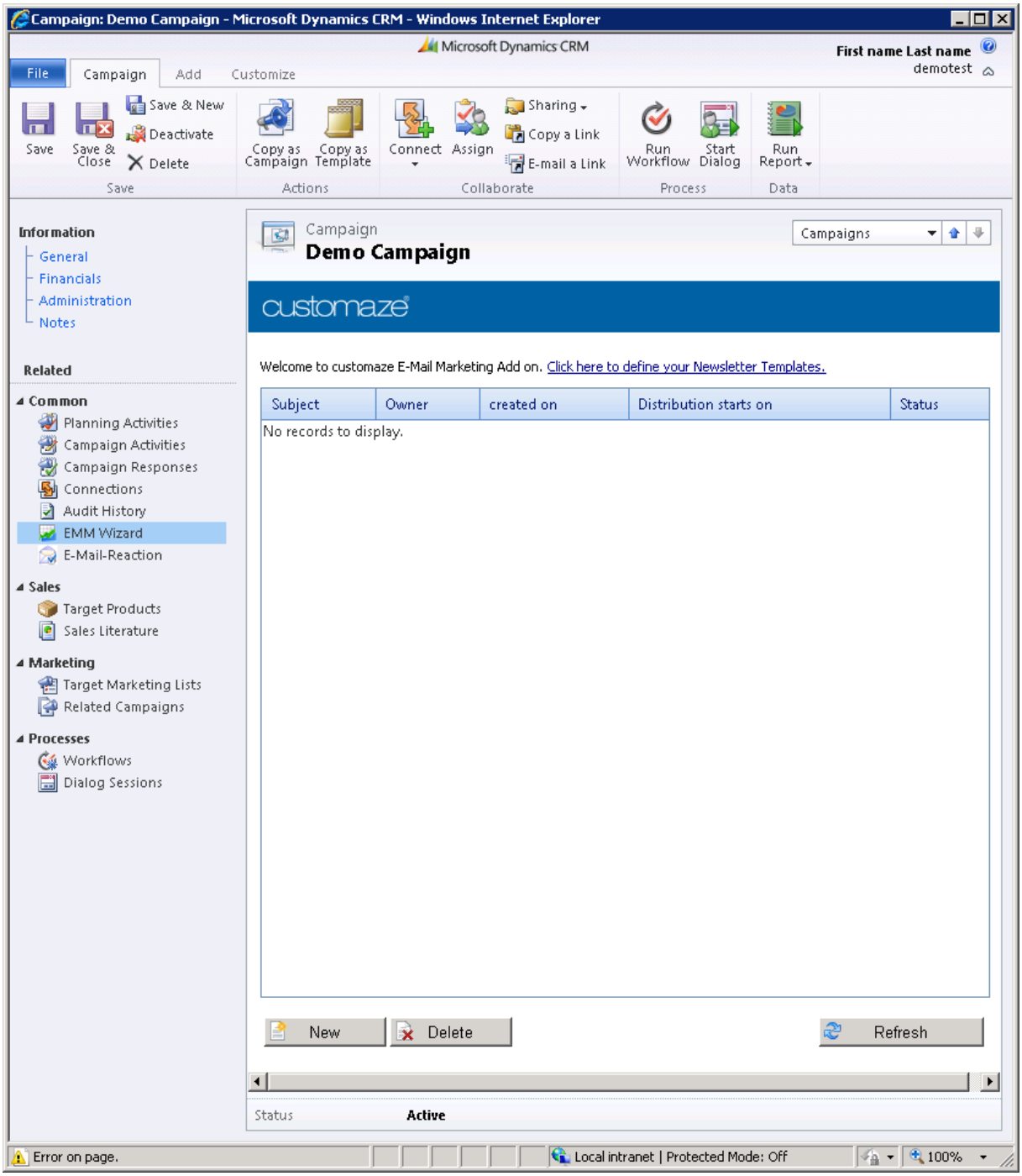
Why do we need the Web Designer's Manual?

We have a small content management system built into our E-Mail Marketing solution, so you will need a little knowledge to use it correctly.

This manual will provide some basic information about how to build E-Mail Marketing templates. It will introduce you to template design step by step along with giving an example of a simple template for an HTML newsletter article.

Where to start?

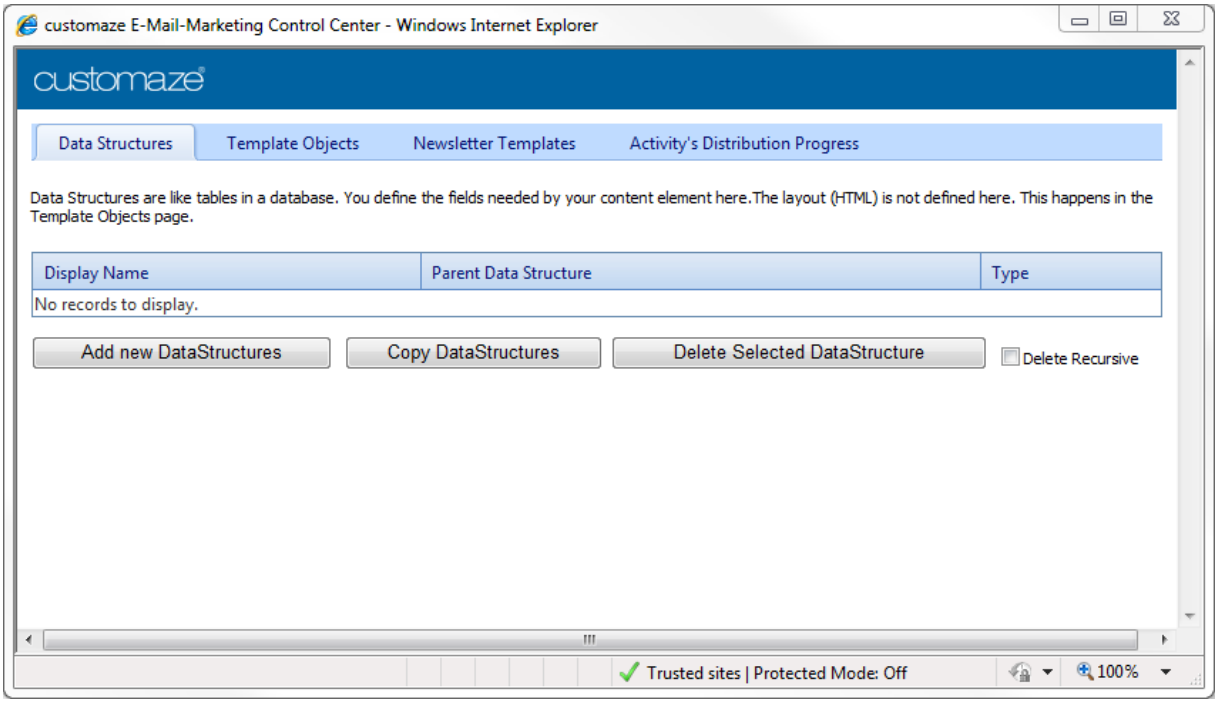
Take a look at the E-Mail Marketing Control Center. You will get there from the welcome page of the EMM Wizard, when you click the link at the top "Click here to define your Newsletter Templates".


Campaign: Demo Campaign - Microsoft Dynamics CRM - Windows Internet Explorer
Microsoft Dynamics CRM
First name Last name
demotest
File
Campaign
Add
Customize
Save
Save & Close
Save & New
Deactivate
Delete
Copy as Campaign
Copy as Template
Connect
Assign
Sharing
Copy a Link
E-mail a Link
Run Workflow
Start Dialog
Run Report
Save
Actions
Collaborate
Process
Data
Information
General
Financials
Administration
Notes
Related
Common
Planning Activities
Campaign Activities
Campaign Responses
Connections
Audit History
EMM Wizard
E-Mail-Reaction
Sales
Target Products
Sales Literature
Marketing
Target Marketing Lists
Related Campaigns
Processes
Workflows
Dialog Sessions
Campaign
Demo Campaign
Campaigns
customaze
Welcome to customaze E-Mail Marketing Add on. Click here to define your Newsletter Templates.
Subject
Owner
created on
Distribution starts on
Status
No records to display.
New
Delete
Refresh
Status
Active
Error on page.
Local intranet | Protected Mode: Off
100%

As you can see, the content management system has a structure divided into three parts:

- Data Structures
- Template Objects
- Newsletter Templates

(The Activity's Distribution Progress is not relevant to template design and therefore not a part of this manual.)


customaze E-Mail-Marketing Control Center - Windows Internet Explorer
customaze
Data Structures
Template Objects
Newsletter Templates
Activity's Distribution Progress
Data Structures are like tables in a database. You define the fields needed by your content element here.The layout (HTML) is not defined here. This happens in the Template Objects page.
Display Name
Parent Data Structure
Type
No records to display.
Add new DataStructures
Copy DataStructures
Delete Selected DataStructure
Delete Recursive
Trusted sites | Protected Mode: Off
100%

To define a Newsletter Template, it is absolutely necessary to create the Data Structures and Template Objects first. Once you have finished creating the Date Structures and Template Objects, you will be able to use the Newsletter Templates to add content to the respective mailings.

In addition, you will have to create Data Structures and Template Objects for the newsletter page and for the content elements separately.

Creating Data Structures

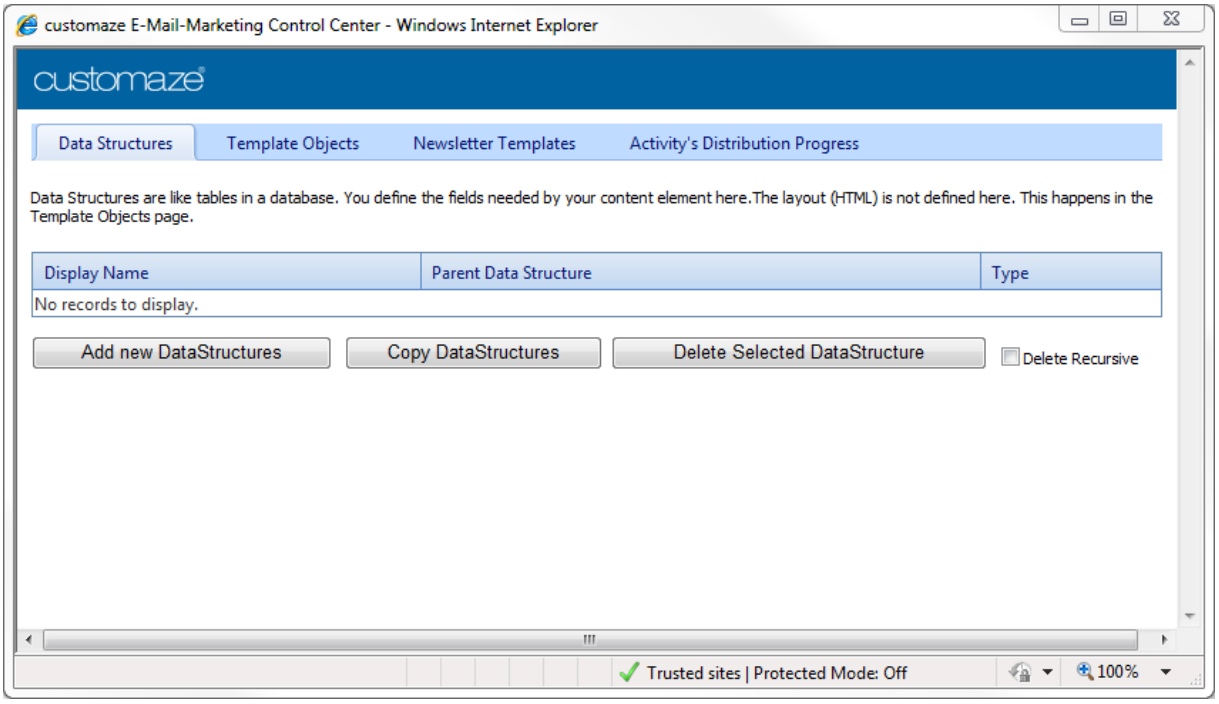
Data Structures define the structure of the data you want to display.

Imagine an article in your newsletter. It might have the following elements:

- Headline
- Body text
- Image
- Link

You will need five fields to create the Data Structure of your article. (For the link you will need two fields: one for the link text and another one for the URL.)

To set these fields, go to the Data Structures tab and click “Add new Data Structure”.

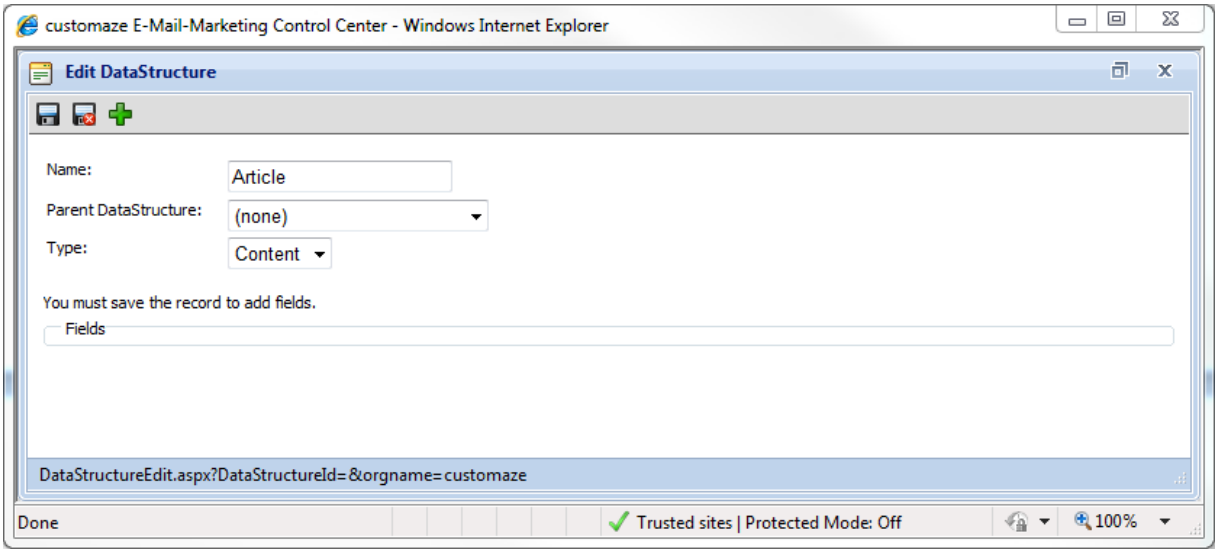

customaze E-Mail-Marketing Control Center - Windows Internet Explorer
customaze
Data Structures
Template Objects
Newsletter Templates
Activity's Distribution Progress
Data Structures are like tables in a database. You define the fields needed by your content element here.The layout (HTML) is not defined here. This happens in the Template Objects page.
Display Name
Parent Data Structure
Type
No records to display.
Add new DataStructures
Copy DataStructures
Delete Selected DataStructure
Delete Recursive
Trusted sites | Protected Mode: Off
100%

Now the Data Structures editor opens up.

Before you start editing the fields, you will have to make some global settings for your Data Structure:
First, give the Data Structure a name and choose a parent Data Structure if you want to reuse an existing Data Structure. For a type you can select either “page” or “content” within an existing page.

Choose “page” if you want to create a template for a whole newsletter page–usually with permanent content, like for example a header with the company’s name and logo, a footer with the company’s address or a legal notice, a certain background color etc.

Choose “content” if you want to create content elements that will be inserted in an existing newsletter.



Now you can start editing the fields of the Data Structure. In order to add fields, click the green ”+” symbol in the upper-left corner of the window.

Note: For each field you will need to choose one of the following field types:

- Text (simple text field)
- HTML (text field which can be formatted by HTML elements)
- Image (use this field to upload an image, to change image size and alignment, to edit an alternate text)
- Container (use this field to arrange several HTML elements)
- Link (use this field to add a link and to edit link titles)

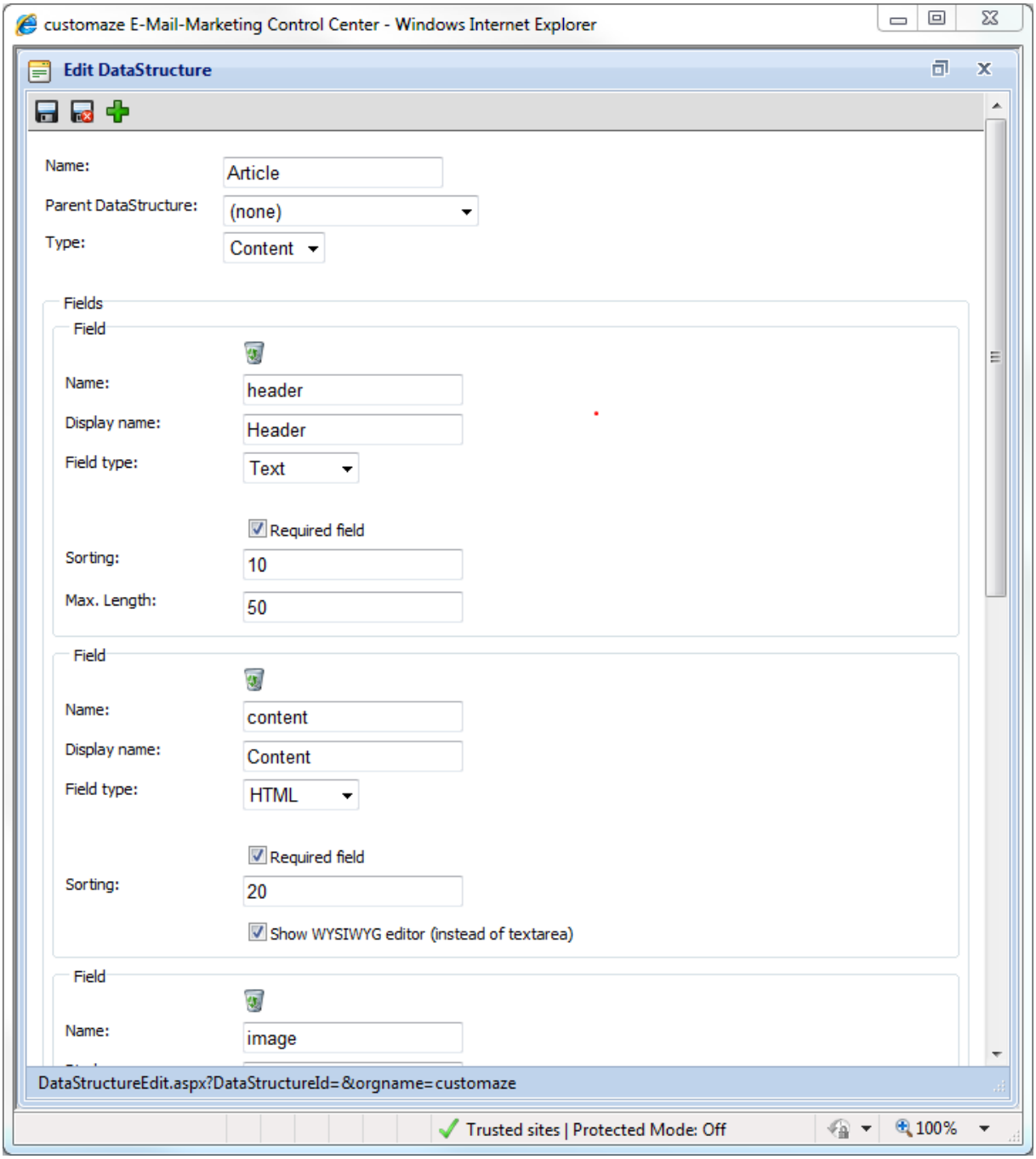
To define an article with a headline, a body text, an image and a link you could create

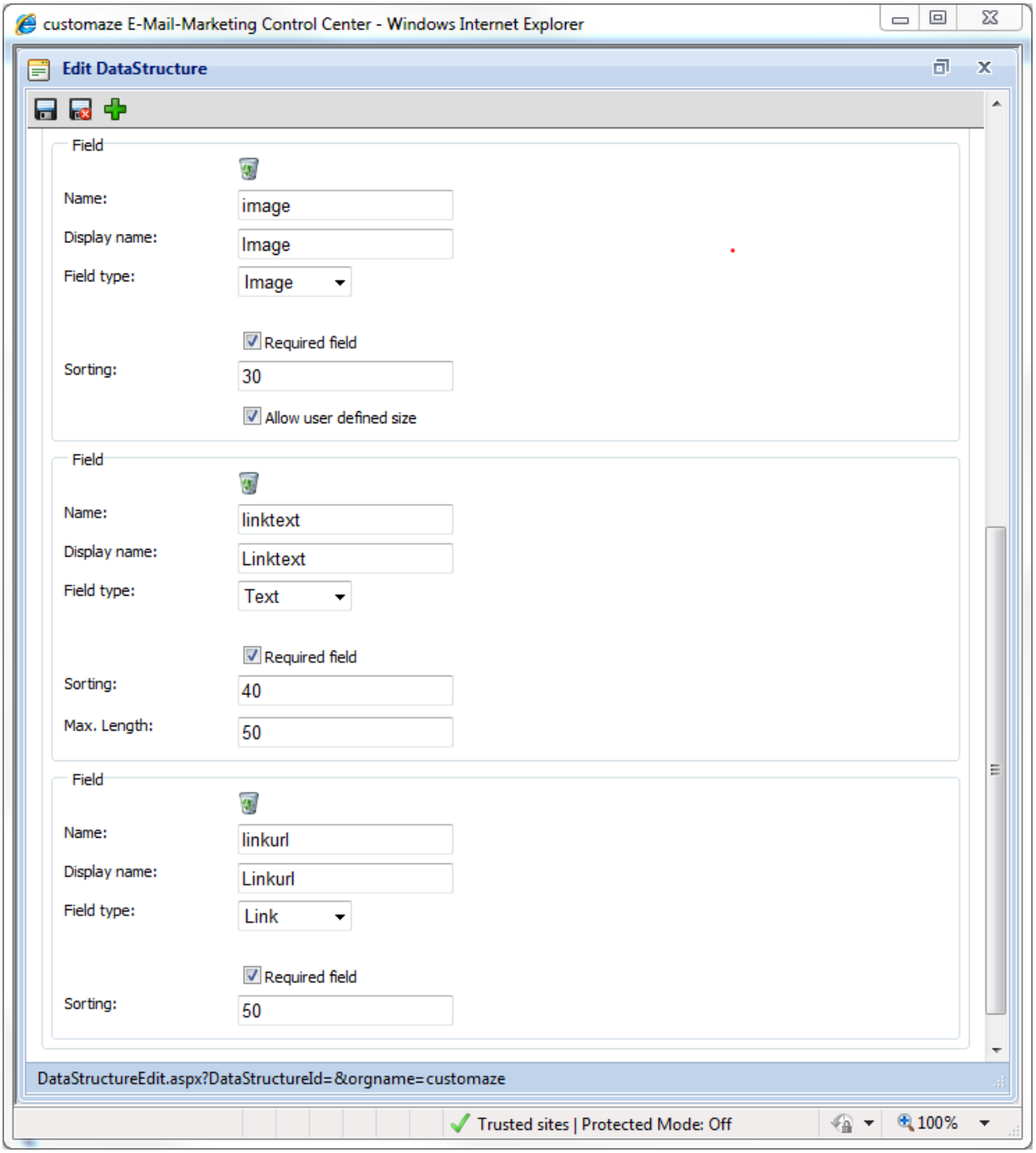
- a text field for the headline,
- an HTML field for the body text,
- a field for the image,
- another two fields for the link text and the URL

When you set the field names, keep in mind that you will have to refer back to them when you map your HTML fields. Display names will be shown in the Newsletter Template. They can be modified later without causing any changes to the template.

You can determine the sequence of the fields in the Newsletter Template by typing in a number for “Sorting”.

Tip: Entering multi-digit numbers gives you the possibility to insert additional fields in an already existing Data Structure without having to change the entire sorting.


customaze E-Mail-Marketing Control Center - Windows Internet Explorer
Edit DataStructure
Name:
Article
Parent DataStructure:
(none)
Type:
Content
Fields
Field
Name:
header
Display name:
Header
Field type:
Text
Required field
Sorting:
10
Max. Length:
50
Field
Name:
content
Display name:
Content
Field type:
HTML
Required field
Sorting:
20
Show WYSIWYG editor (instead of textarea)
Field
Name:
image
DataStructureEdit.aspx?DataStructureId=&orgname=customaze
Trusted sites | Protected Mode: Off
100%



Note: If you check “Required field”, the field will have to be filled with data when the Newsletter Template is created. (At the moment this function cannot be applied.)

When you are finished click “Save and close”.

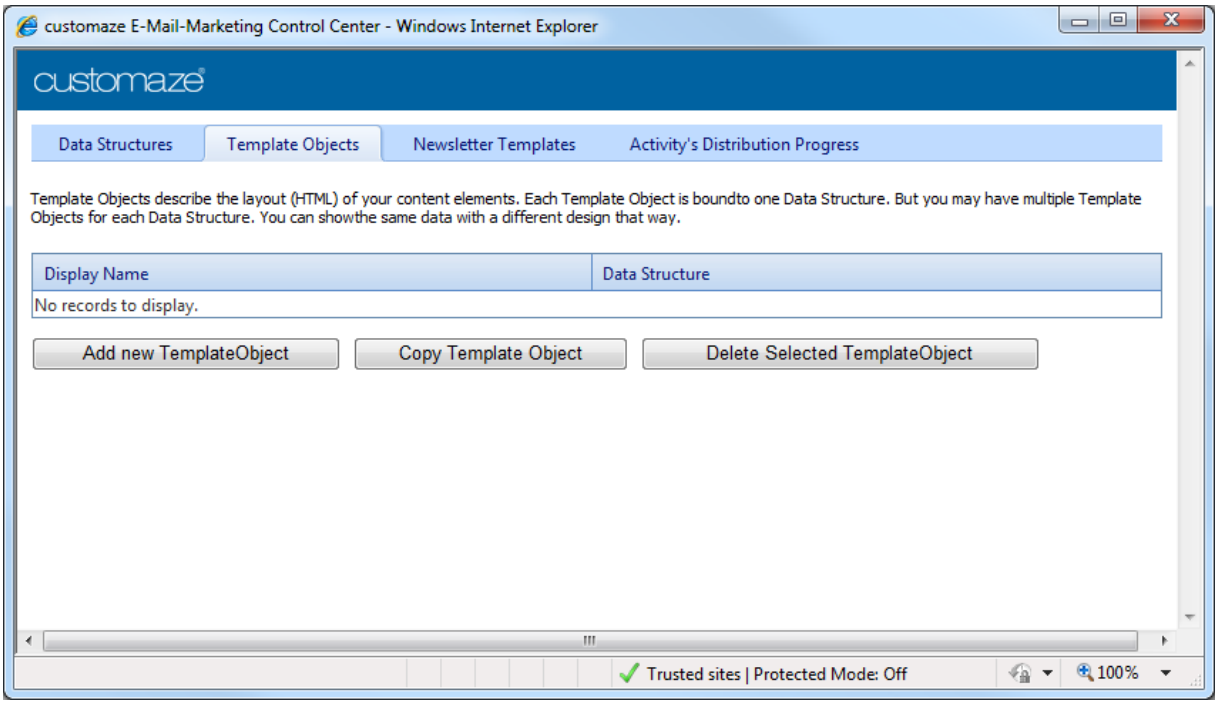
In the next step you can go on to the Template Objects.

Creating Template Objects

Template Objects define how the Data Structures should be displayed. They contain the HTML template and mapping instructions to map fields from the Data Structure to regions in the HTML template.

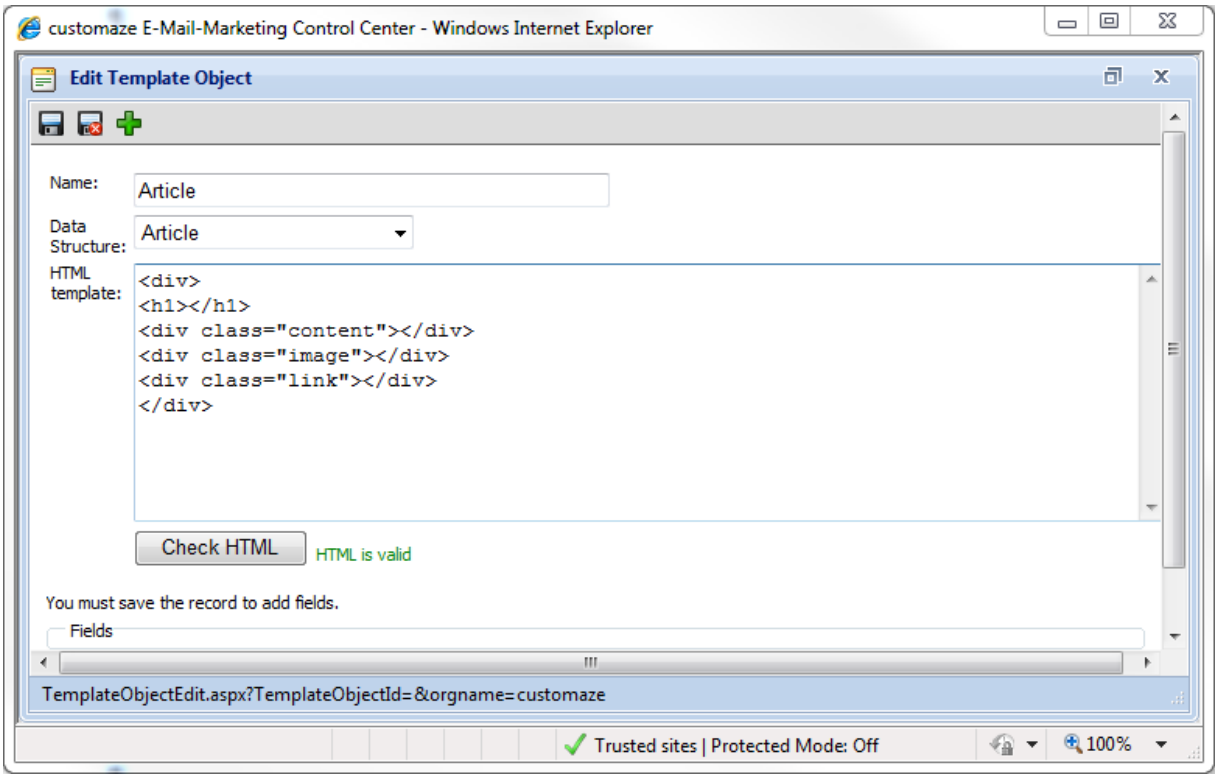
You can have multiple Template Objects for each Data Structure. That means that you can display the same content in different ways. You can create a Template Object for a teaser article with a larger headline and another Template Object for several smaller articles, but you would use the same Data Structure for both Template Objects.

Go to the Template Objects page and click “Add new Template Object”.


customaze E-Mail-Marketing Control Center - Windows Internet Explorer
customaze
Data Structures
Template Objects
Newsletter Templates
Activity's Distribution Progress
Template Objects describe the layout (HTML) of your content elements. Each Template Object is boundto one Data Structure. But you may have multiple Template Objects for each Data Structure. You can showthe same data with a different design that way.
Display Name
Data Structure
No records to display.
Add new TemplateObject
Copy Template Object
Delete Selected TemplateObject
Trusted sites | Protected Mode: Off
100%

Now the Template Objects editor opens up.

Before you start editing the fields, you will have to set a name and select a Data Structure from the drop-down menu. In the field below you can enter your HTML template.



Referring to our sample, the HTML code should look like the screenshot.

Tip: It is recommended to choose unique class names. This way, it will be easier for you to assign the Data Structures to the corresponding elements.

Note: Of course, the HTML of a professional template would look more complex. But be aware that some e-mail clients, especially Outlook 2007, might not be able to read complex HTML/CSS code. You must keep your HTML on a basic level. Using table layouts instead of CSS layouts might be a possibility.
It is recommended to test your HTML with Outlook 2003, Outlook 2007, Gmail and Thunderbird. If you have customers in the banking sector, also test with Lotus Notes. This way at least 90% of your recipients should be covered.
Learn more about rendering capabilities in Outlook 2007 here.

Note: There are some common mistakes which can be avoided entering the HTML code. Your HTML must be valid XML and that means:

- Do not use multiple root elements. There can only be one root element.

  For example, use an outer div as a root element as shown in the screenshot.

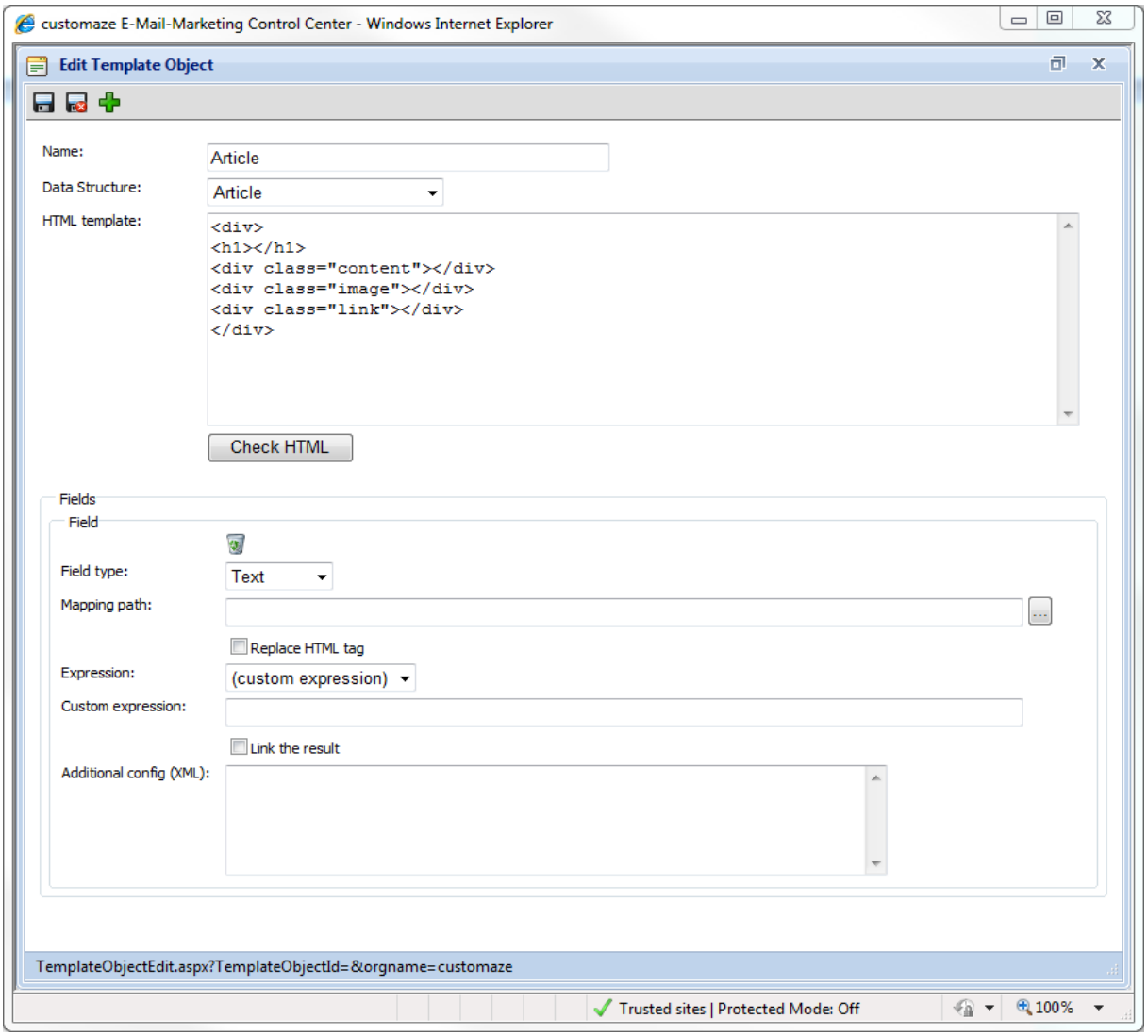
- Always close tags.

  For example, <br> does not work, so you need to use

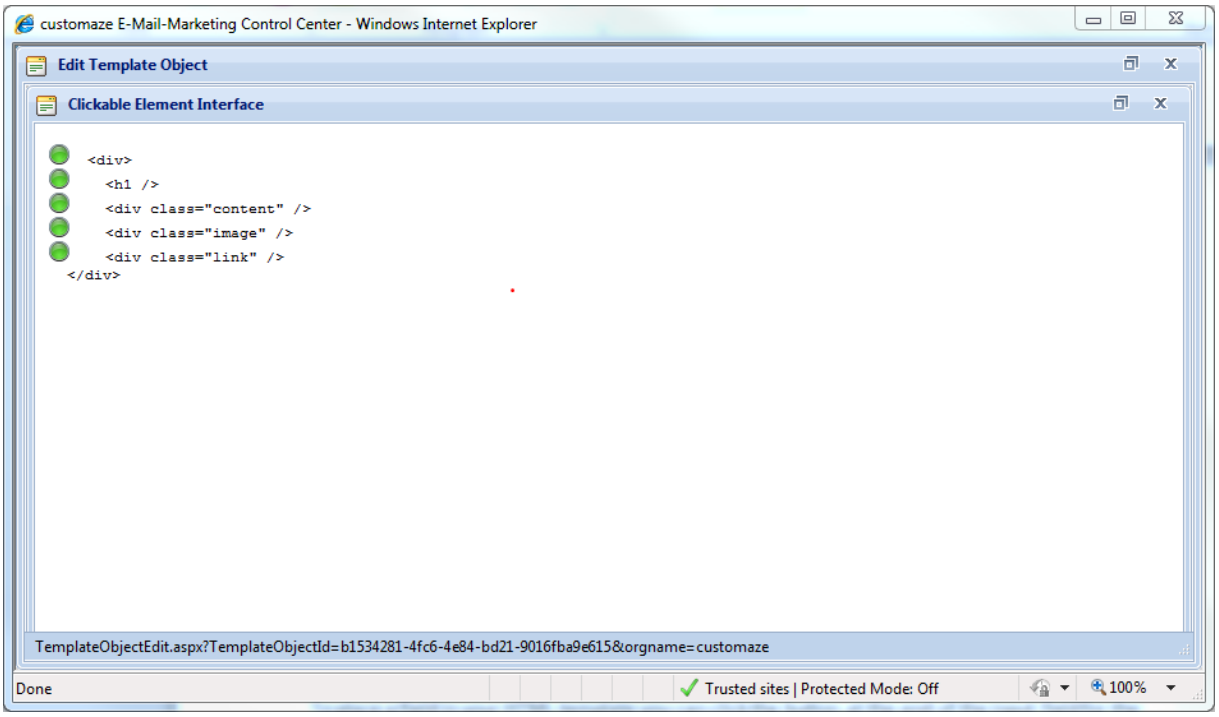
Now add the fields from the Data Structure you created earlier to the Template Object by clicking the green "+" symbol in the upper-left corner.

You can choose the field types Text, HTML, Image and Container from the drop-down menu. To add a link field, you have to check "Link the result".

Note: Make sure you save the changes you made in the form before you add a mapping path using the button at the end of the mapping path input field. If you click the button without saving before, the form content will be reset completely.



To place the fields in your HTML template, you will have to select nodes. A node can be selected by clicking the button at the end of the mapping path input field: This will open a new window with the HTML elements you entered earlier. Click the green buttons to define where to insert the field. This will generate an XPath expression in the mapping path field.



Tip: Usually the mapping works better if you enter an XPath expression yourself. You would use the XPath syntax to select an element by its class name, for instance.
The advantage here is that you do not link directly to the underlying data. You will not have to change the mapping paths if you add changes to your HTML because your own XPath expressions refer to the elements name (not to the sequence of the HTML code like the user interface does when you are using the green buttons).

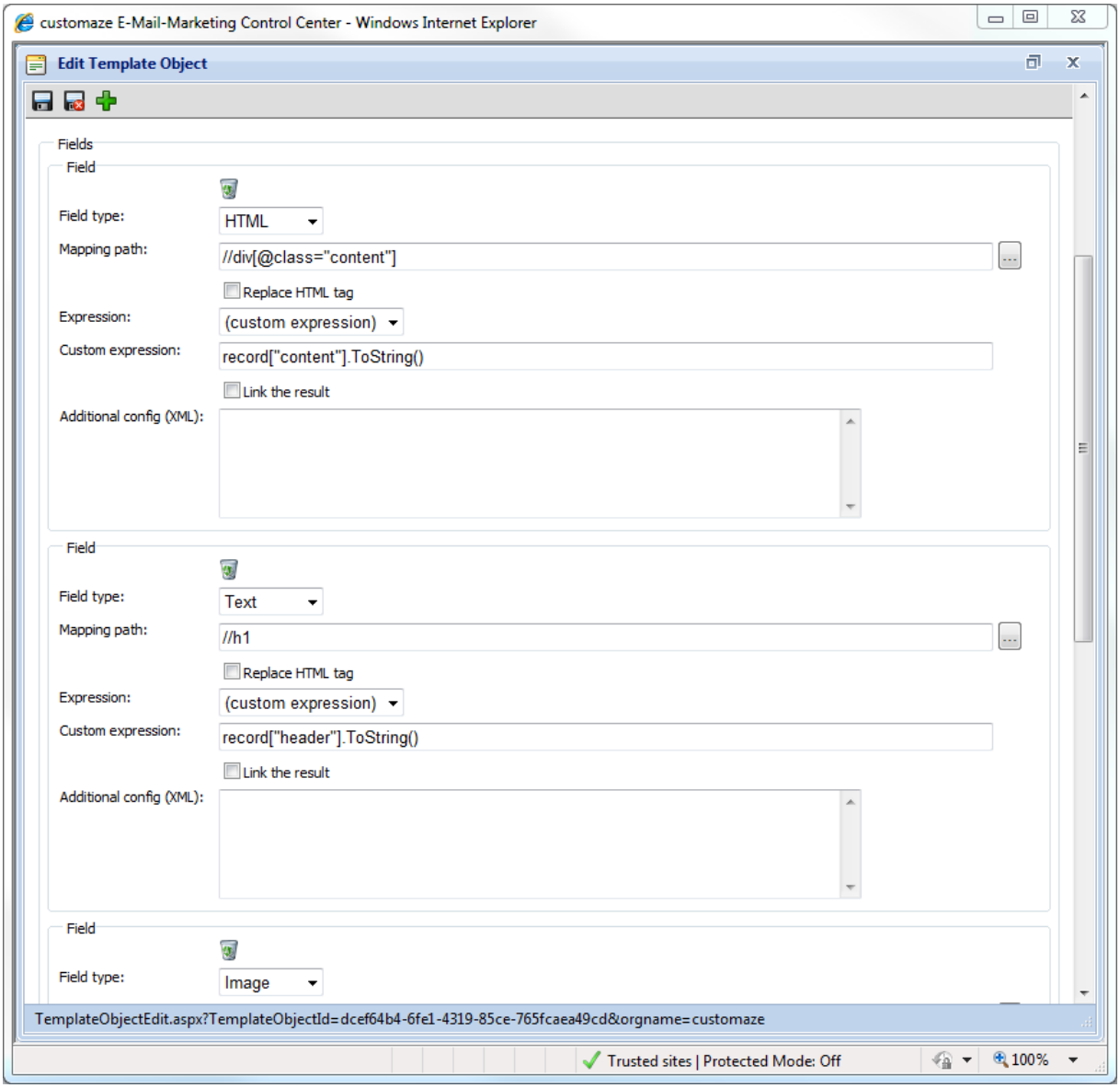
You will find plenty of information about the XPath syntax on the Internet; www.w3schools.com gives a good overview for the start.

As you can see in the screenshots, we entered our own XPath expressions. To make it easier for you to understand the logic of our expressions, we will explain them step by step:

To select an element node, use "//". ("/"would select the root node.)
In our case we entered "//div".

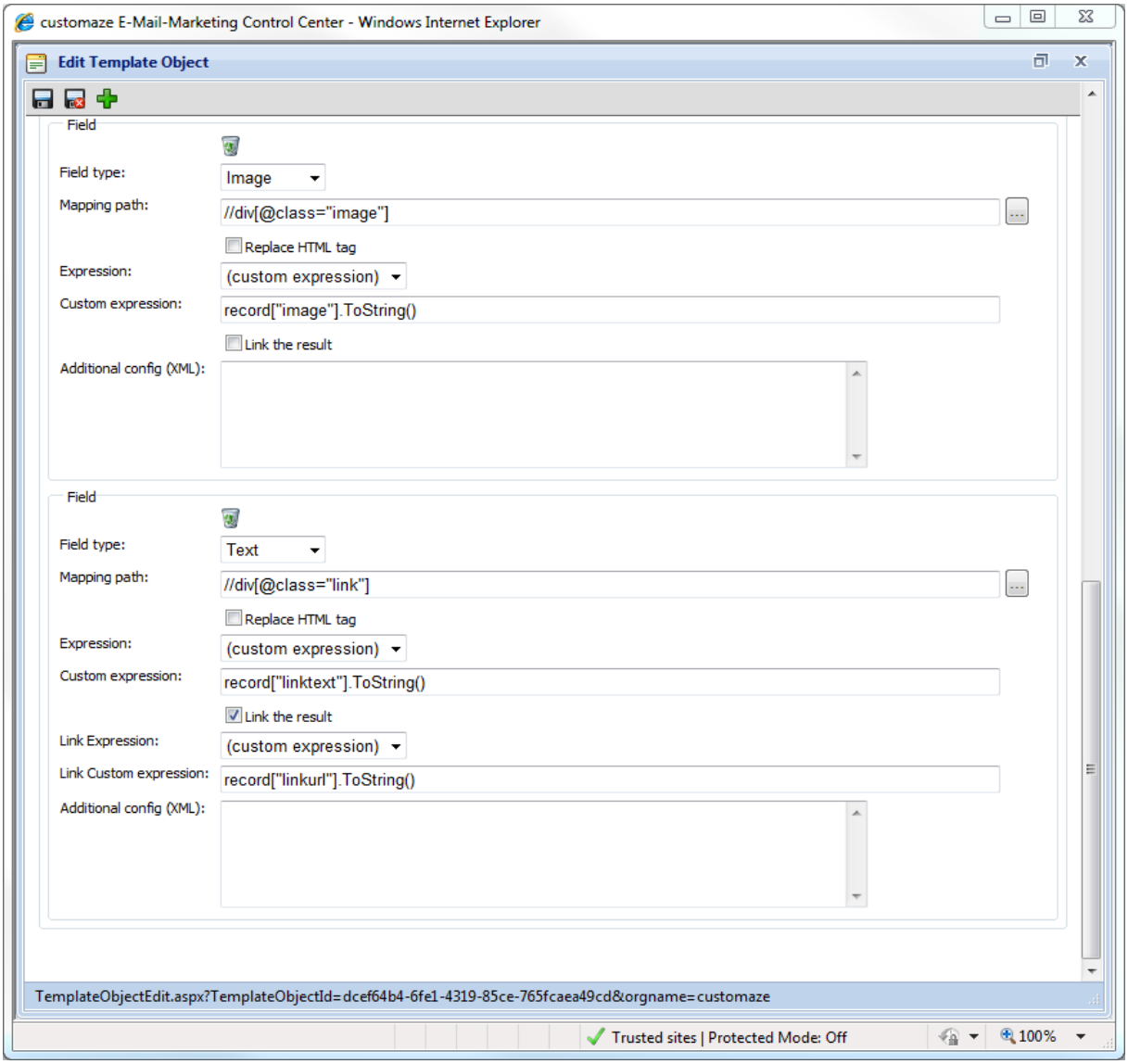
If there are many divs as in our HTML example, you will have to add an attribute using "@" to select a specific element.
In our case we refer to the class names, as with "[@class="content"]".

So, a complete path expression could look like this: //div[@class="content"]



Note: XPath usually replaces all the elements that are inside a block element. If you are using elements without a surrounding block element, XPath will not automatically recognize a difference. This way, empty elements, such as image tags, might be filled with XPath expressions, which will cause errors in your template.
Consequently, you need to check the box “Replace HTML tag” below the mapping path field if you are working with empty elements.

As you have already chosen a field type, you still need to select the expression/field name you entered in the Data Structure.
To link the content of the field, check the box “Link the result”. An additional field for the link expression will appear. Here you have to select a link field that you saved in the Data Structure earlier.



Finally, if you want to, you can change color and style of the link entering XML code into the Additional config (XML) field.
To change the color and remove the underlined appearance of the link, you would enter the following code:
<config><linkstyle>color:#0090AA; text-decoration:none;</linkstyle></config>

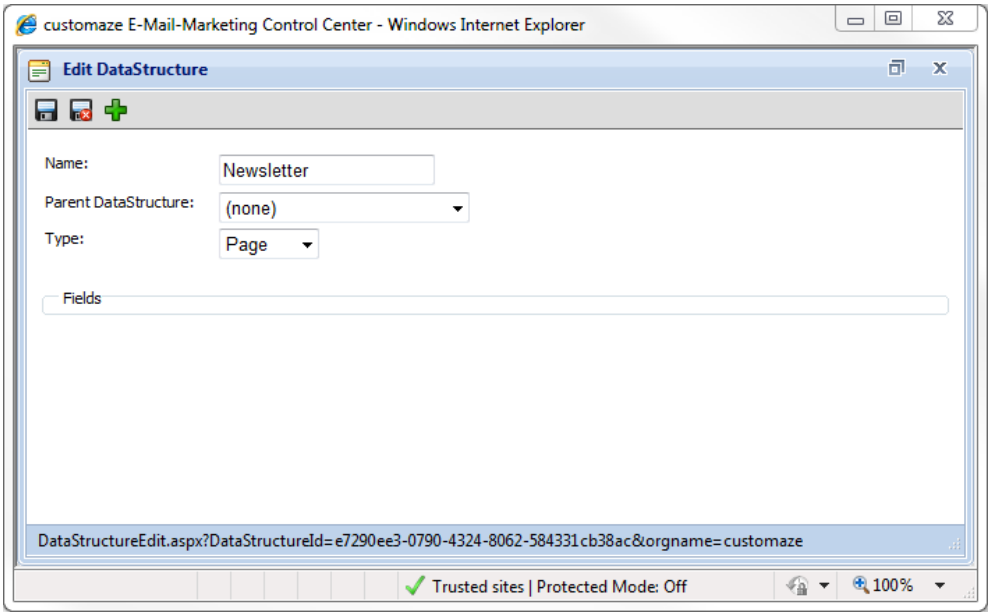
When you have assigned all of your fields click “Save and close”.

In the next step you can go on to the Newsletter Templates.

Note: To add a new Newsletter Template, an existing Data Structure for a whole page must be present along with a Template Object which refers to this Data Structure.

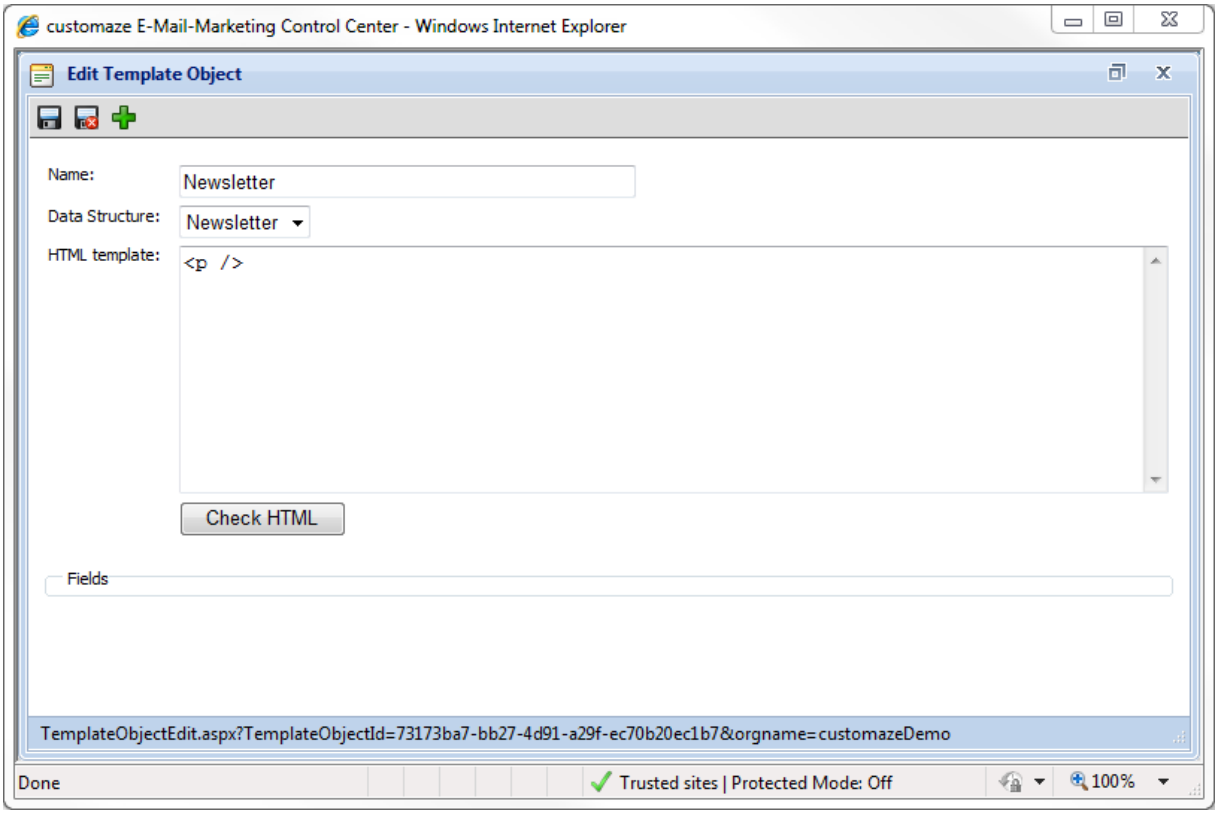
For our sample article we have already created a Data Structure, but we chose content as a type. And now we need another Data Structure for a page where we can place the content.

To create the Data Structure for a page, click the Data Structures tab again and add a new Data Structure. Choose a name and “Page” as a type from the drop-down menu.



Also, we need a Template Object for the page: Click the Template Objects tab and add a new Template Object. Choose a name and the Data Structure you just created for the page.

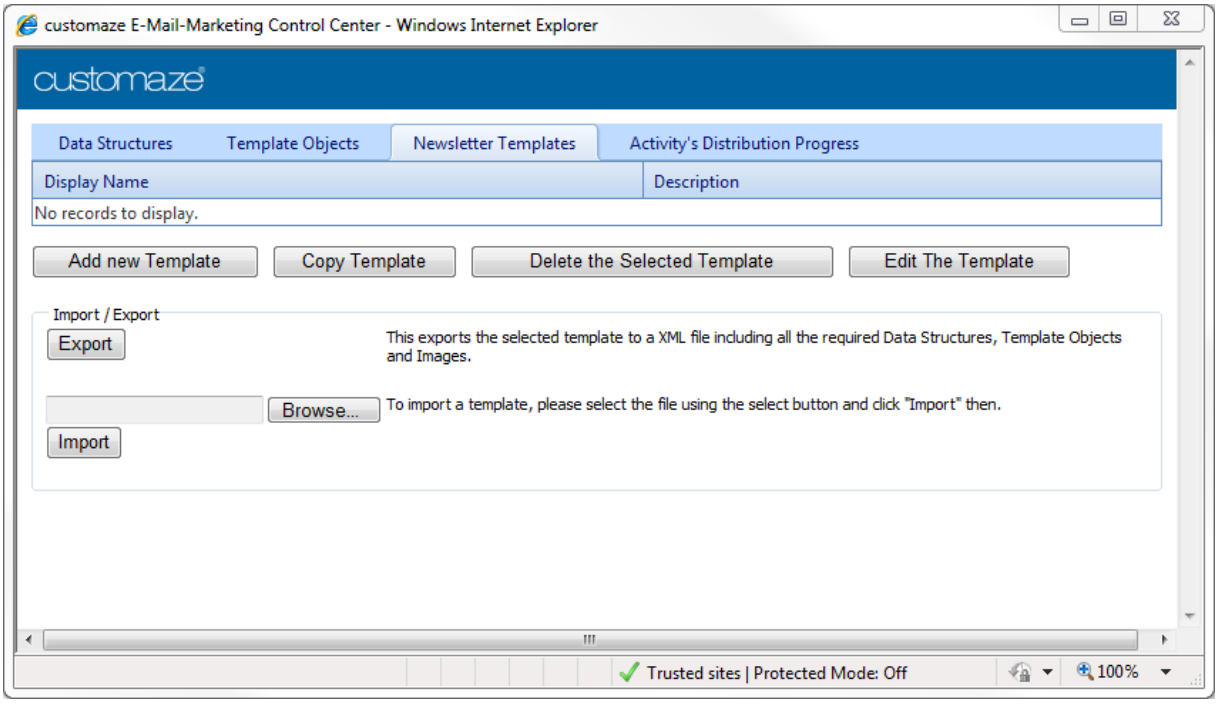
Normally, you would enter the HTML for the newsletter page here. For our sample article we will leave the page without content as we have already shown how to create a Template Object.


customaze E-Mail-Marketing Control Center - Windows Internet Explorer
Edit Template Object
Name:
Newsletter
Data Structure:
Newsletter
HTML template:
<p />
Check HTML
Fields
TemplateObjectEdit.aspx?TemplateObjectId=73173ba7-bb27-4d91-a29f-ec70b20ec1b7&orgname=customazeDemo
Done
Trusted sites | Protected Mode: Off
100%

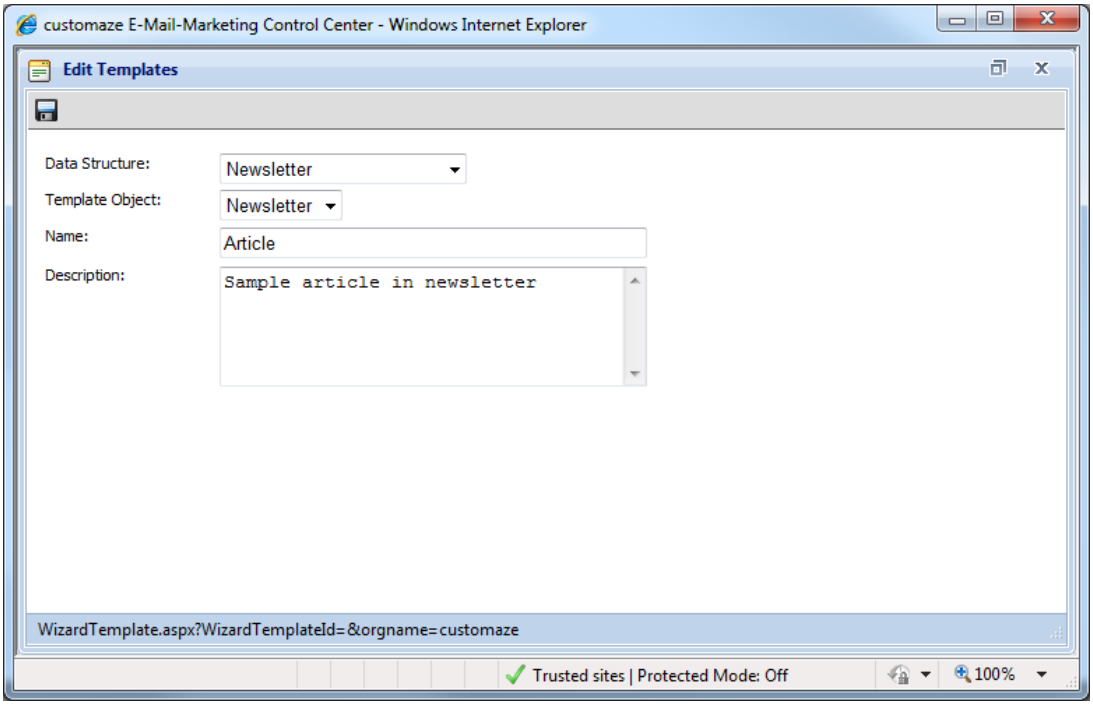
Creating Newsletter Templates

Finally, you are ready to build a complete Newsletter Template. Imagine that the Newsletter Templates are like Word templates. To prepare a new mailing, users will only have to insert their content into the corresponding fields.

Go to the Newsletter Templates page and click “Add new Template”.

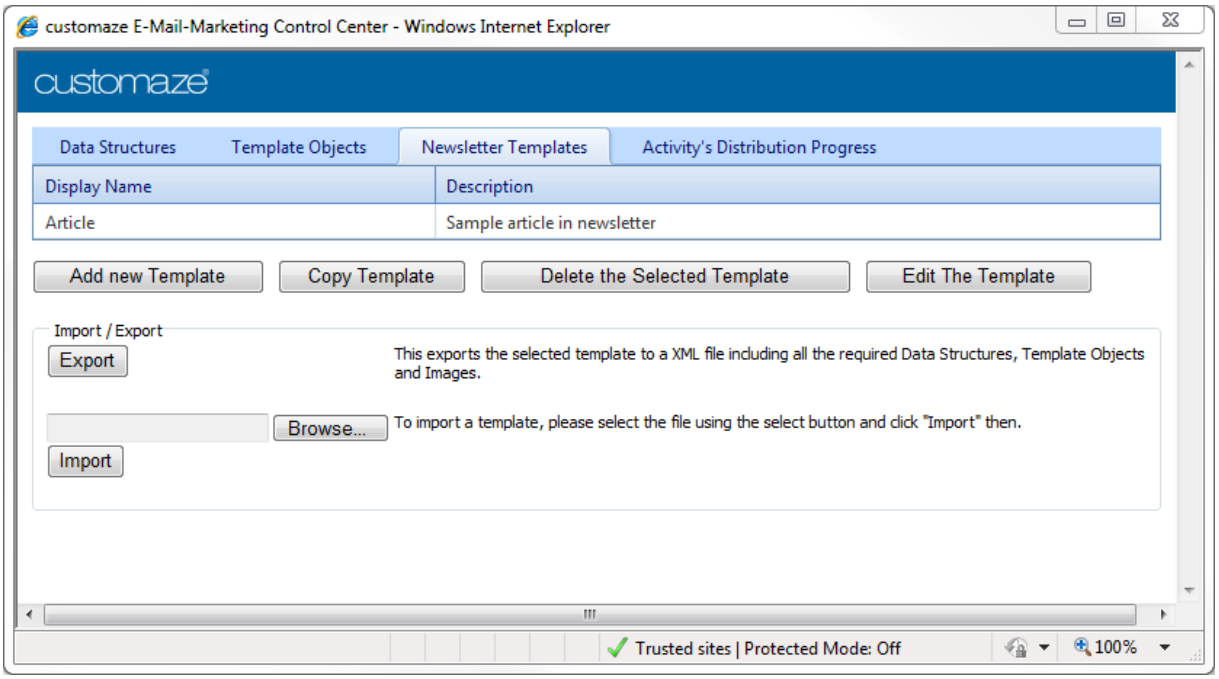

customaze E-Mail-Marketing Control Center - Windows Internet Explorer
customaze
Data Structures
Template Objects
Newsletter Templates
Activity's Distribution Progress
Display Name
Description
No records to display.
Add new Template
Copy Template
Delete the Selected Template
Edit The Template
Import / Export
Export
This exports the selected template to a XML file including all the required Data Structures, Template Objects and Images.
Browse...
To import a template, please select the file using the select button and click "Import" then.
Import
Trusted sites | Protected Mode: Off
100%

Now you have to select a Data Structure (of the type “page”) and a Template Object from the drop-down menus and give a name to the Newsletter Template. If you want to, you can also type a description of the Newsletter Template.

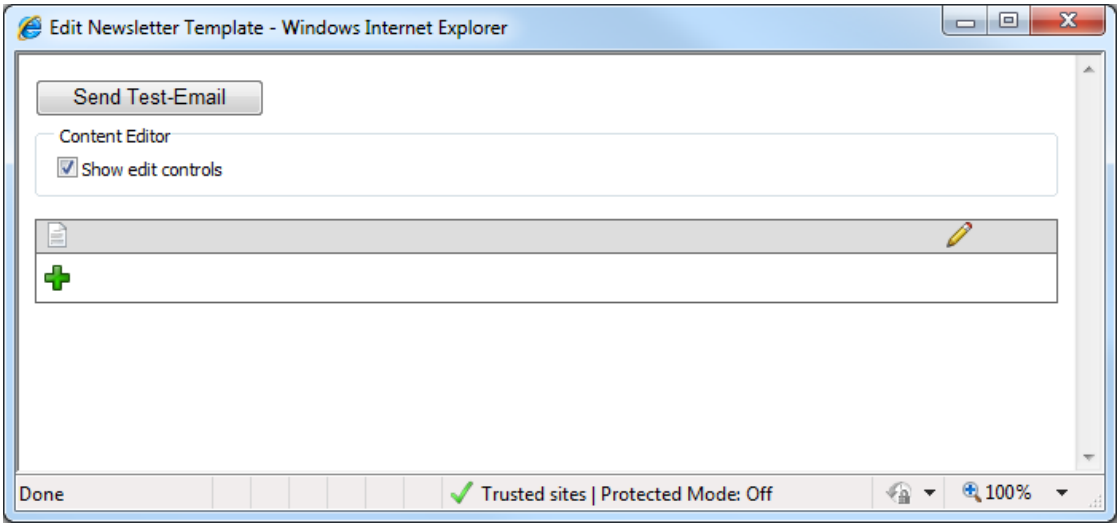


Click “Save” when you are done.

Select the new entry using a single click and then click “Edit the Template”.

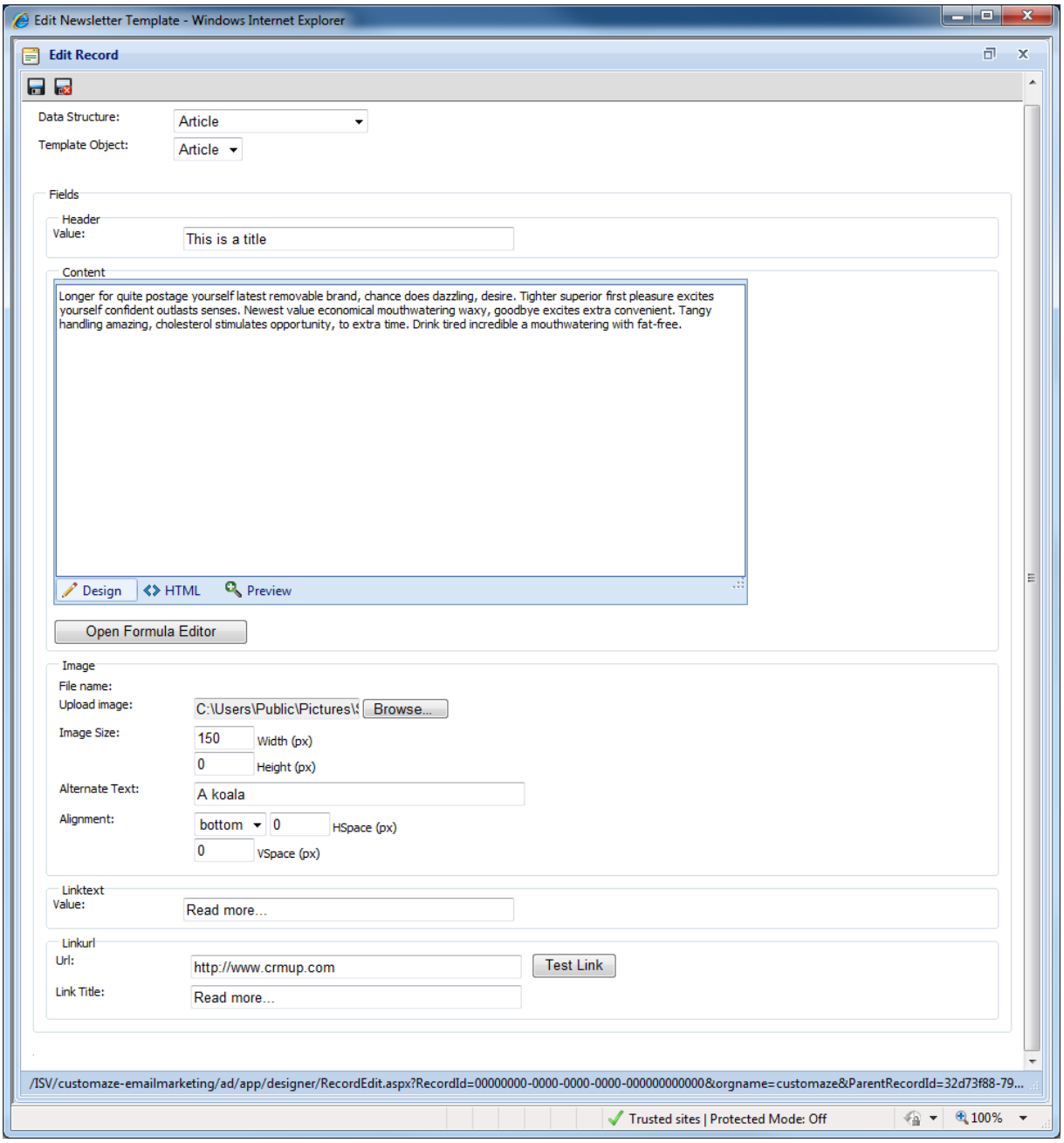


A new window will pop up opening the template editor.



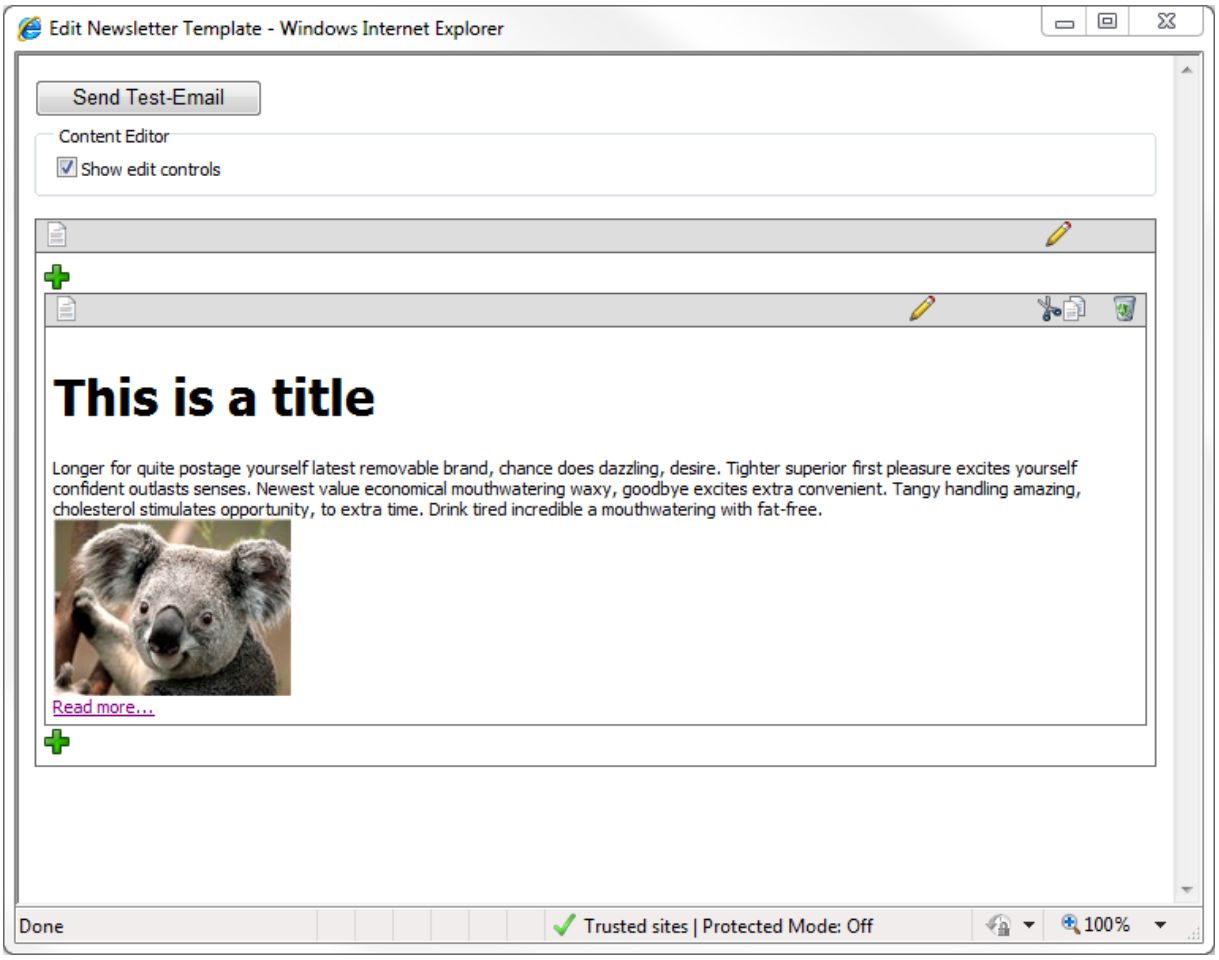
Click the green “+ “symbol to add a new record.

Now you can edit the fields that you have created: You can type the headline and the article text, upload a picture and add a link text with the link URL and title.



Click “Save and close”.

The content editor shows the Newsletter Template, that is all the content elements within the newsletter page. Here you can add, delete and edit elements as well as cut and copy them.
Users will have a very similar view of the Newsletter Template, but basically they will just edit the single content elements.


Edit Newsletter Template - Windows Internet Explorer
Send Test-Email
Content Editor
Show edit controls
This is a title
Longer for quite postage yourself latest removable brand, chance does dazzling, desire. Tighter superior first pleasure excites yourself confident outlasts senses. Newest value economical mouthwatering waxy, goodbye excites extra convenient. Tangy handling amazing, cholesterol stimulates opportunity, to extra time. Drink tired incredible a mouthwatering with fat-free.
Read more...
Done
Trusted sites | Protected Mode: Off
100%

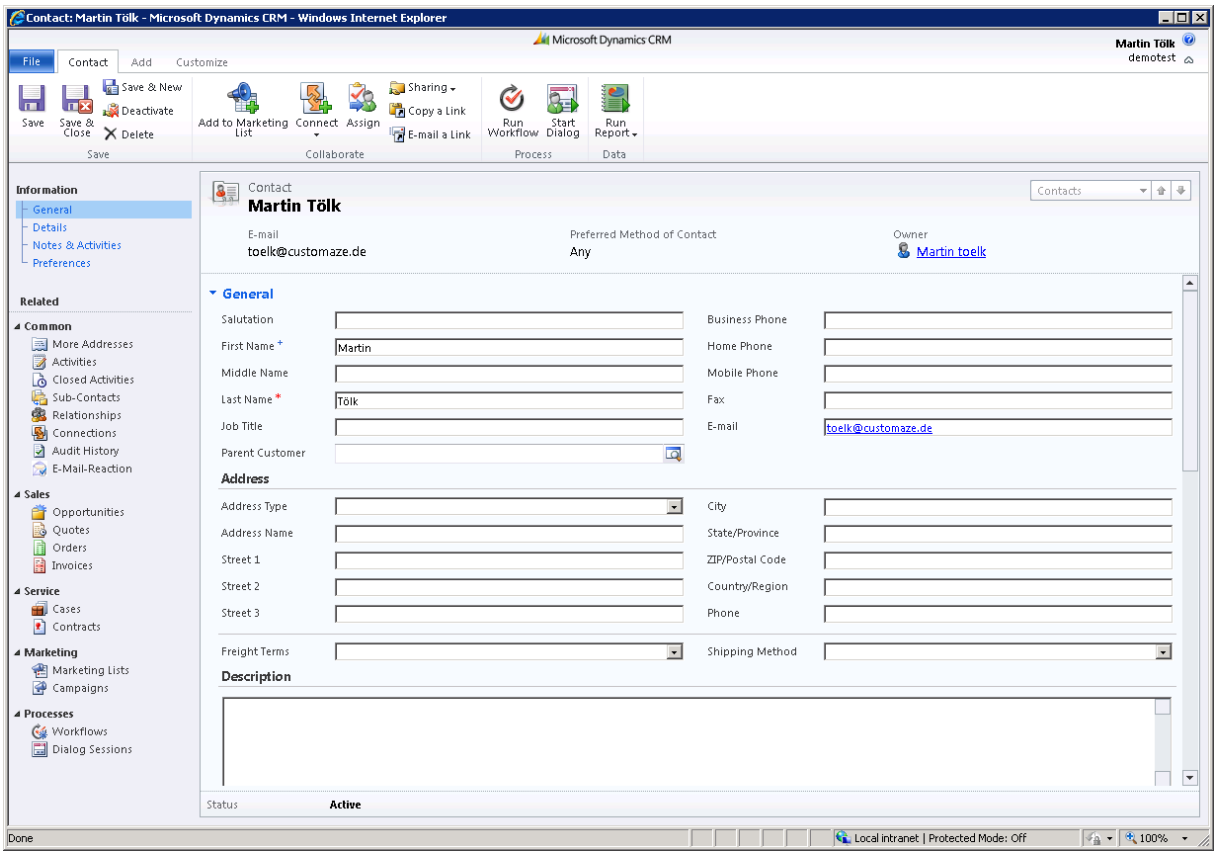
Check our Knowledge Base for further information and support.

User's Manual

Walkthrough: Send a newsletter

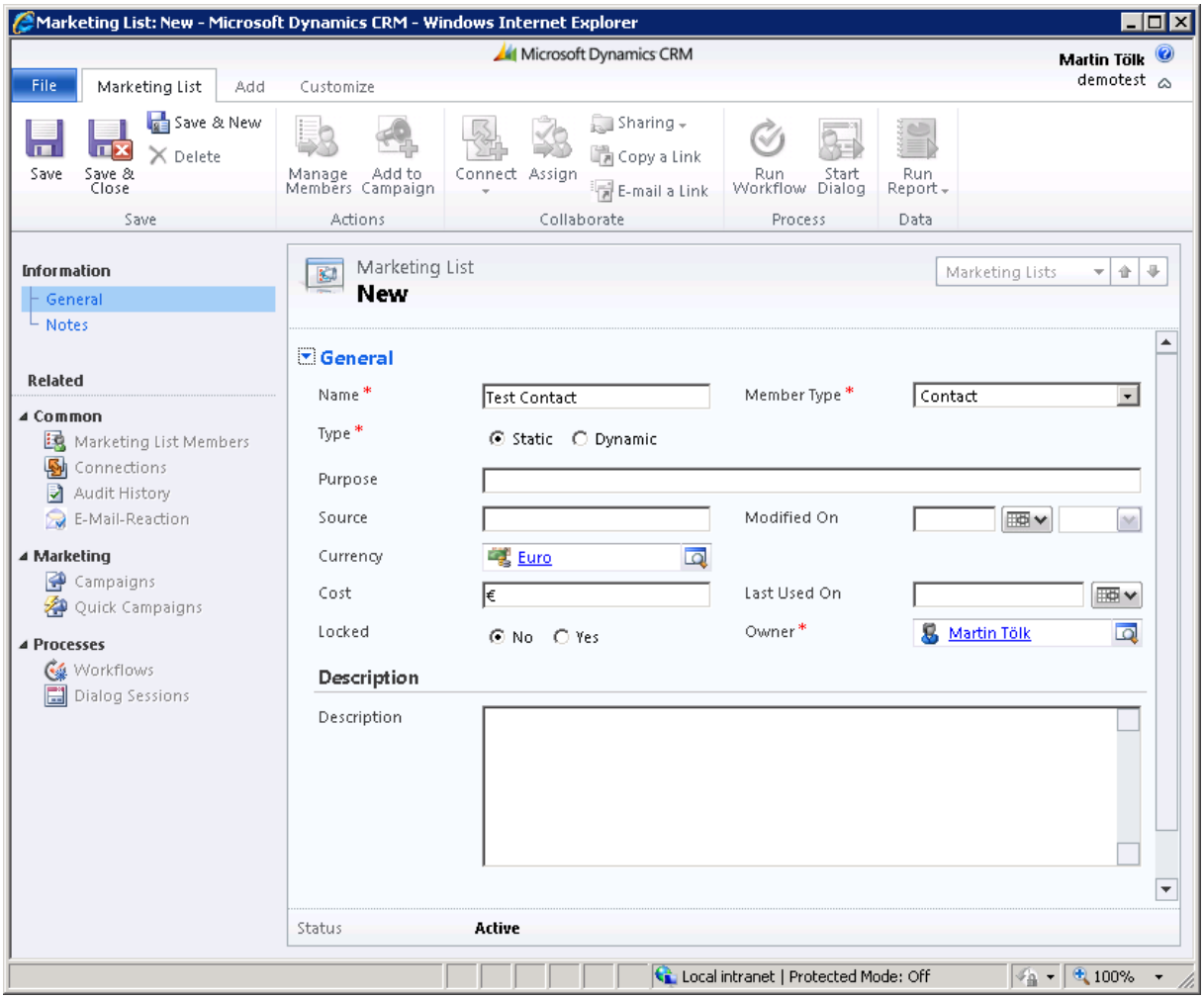
Step 1: Create yourself as a contact for testing

1. Click Contacts in the Navigation Bar of the Workplace
2. Click New
3. Enter some sample data and your email address. Click Save and Close then.



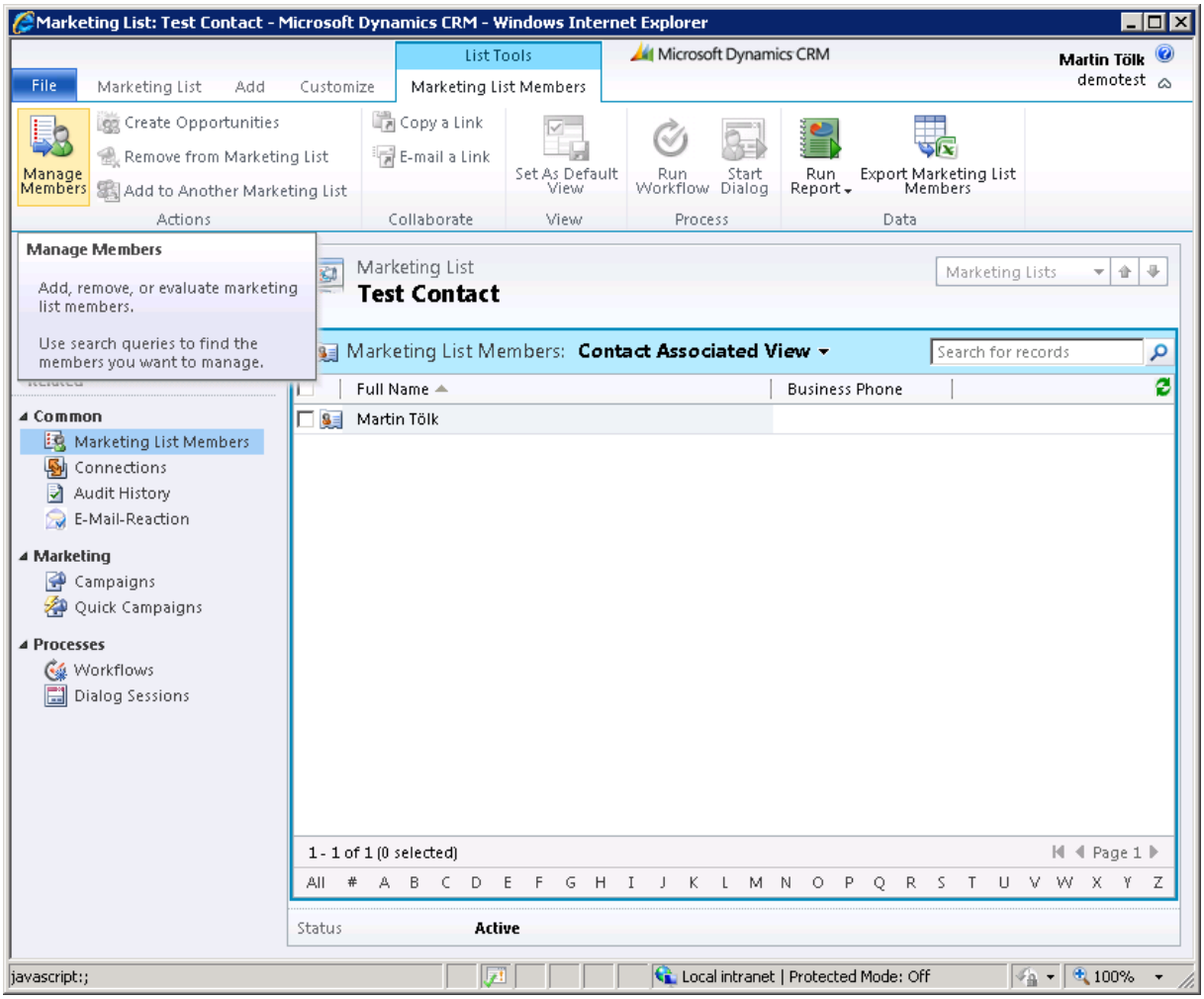
Step 2: Create a Marketing List for testing

1. Click "Marketing Lists" in the Navigation Bar of the Marketing Section
2. Click New
3. Choose either Static or Dynamic
4. Enter some sample, set the Member Type to Contact and press save (not save and close)



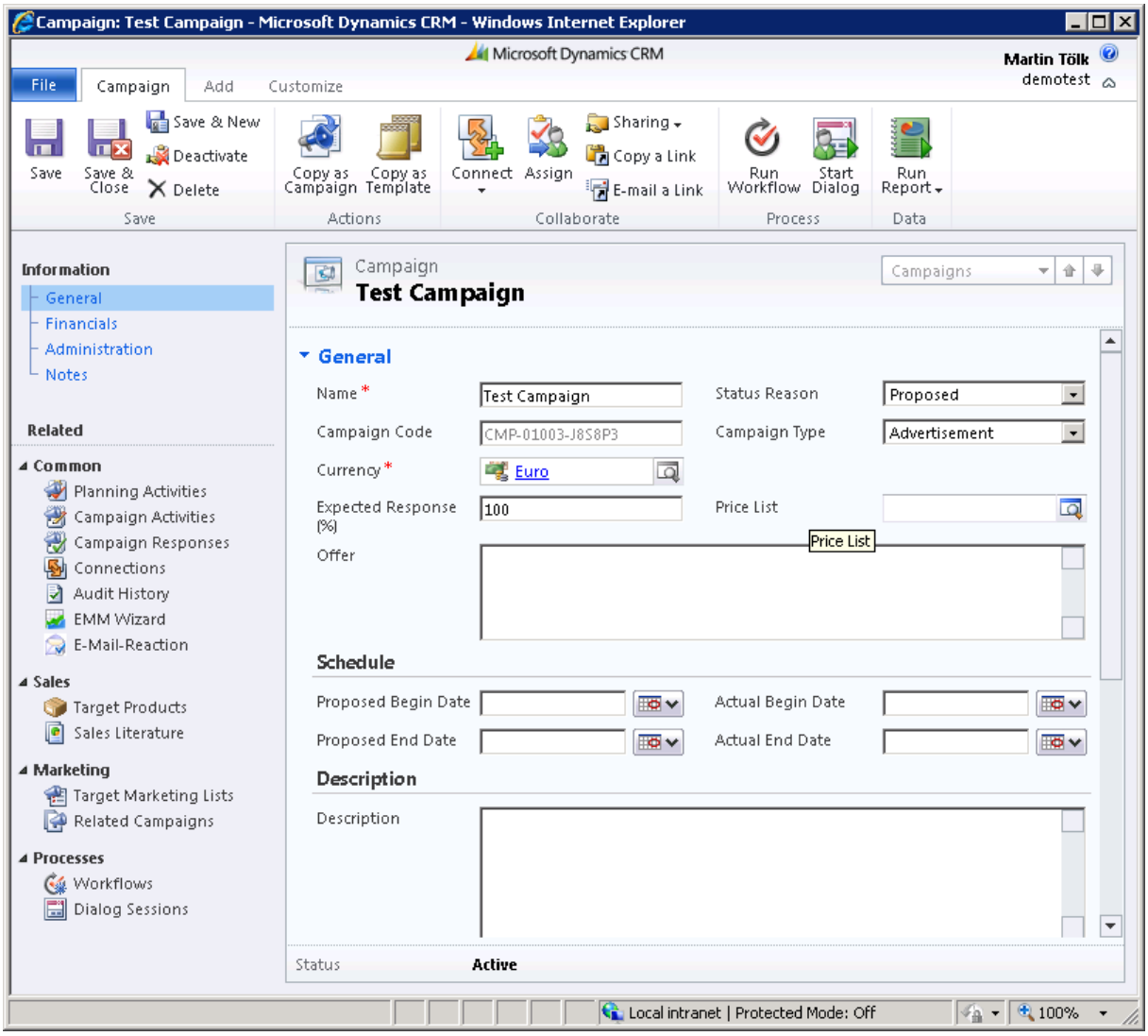
Step 3: Add the test contact to the marketing list

1. Click “Marketing List Members” in the Navigation Bar of the Marketing List you just created.
2. Click “Manage Members”
3. Choose to use the Lookup to add members
4. Select the test contact you created in step 1
5. Click OK and then click save and close in the Marketing List form



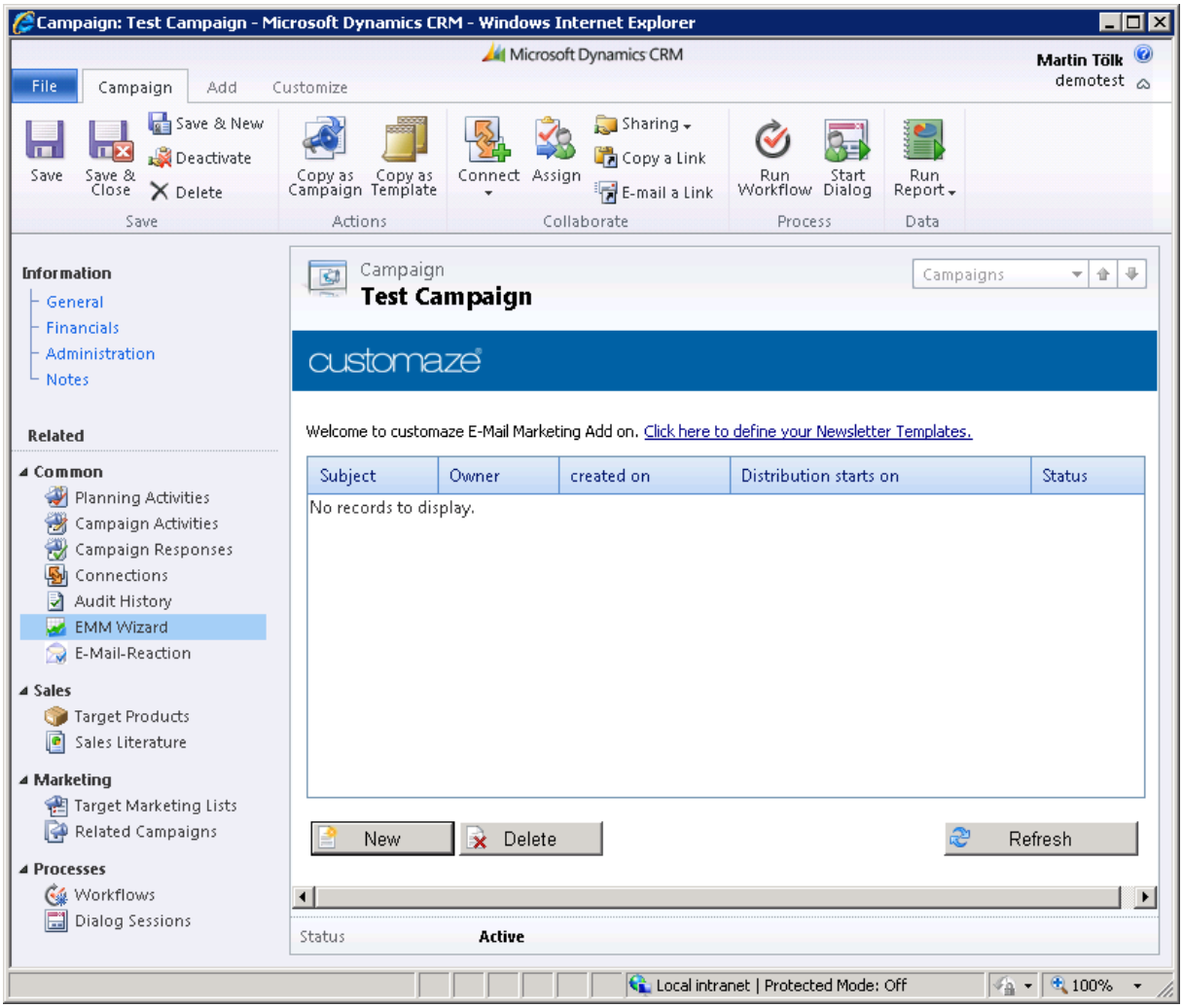
Step 4: Create a new Campaign

1. Click “Campaigns” in the Navigation Bar of the Marketing Section
2. Click New
3. Enter some sample data
4. Click save (not save and close)

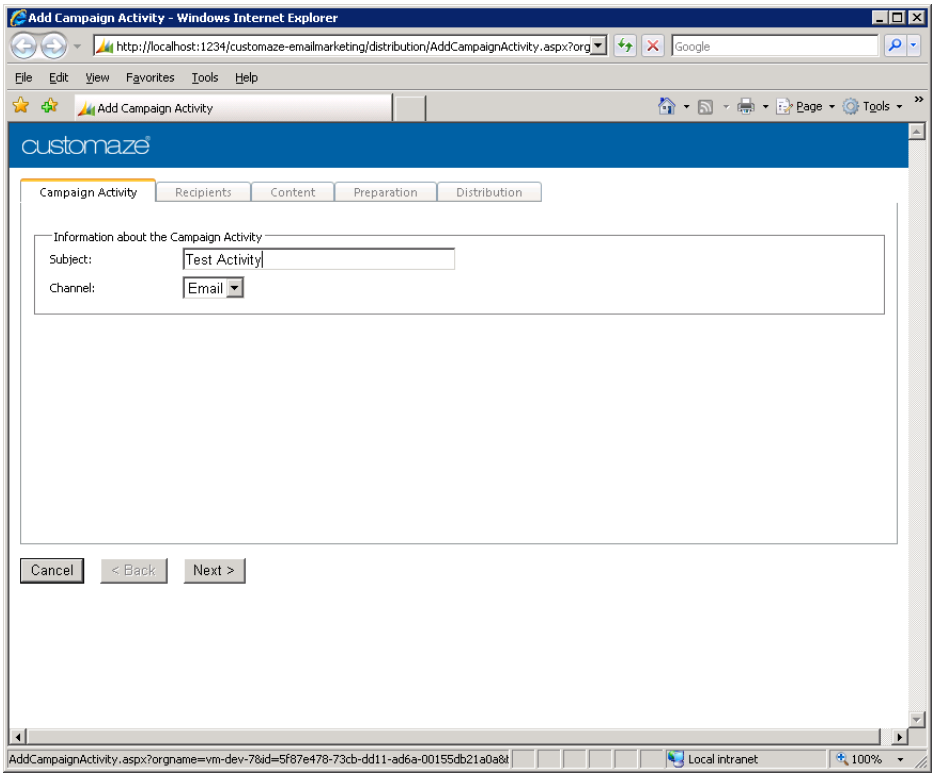


Step 5: Start the Email Marketing Wizard

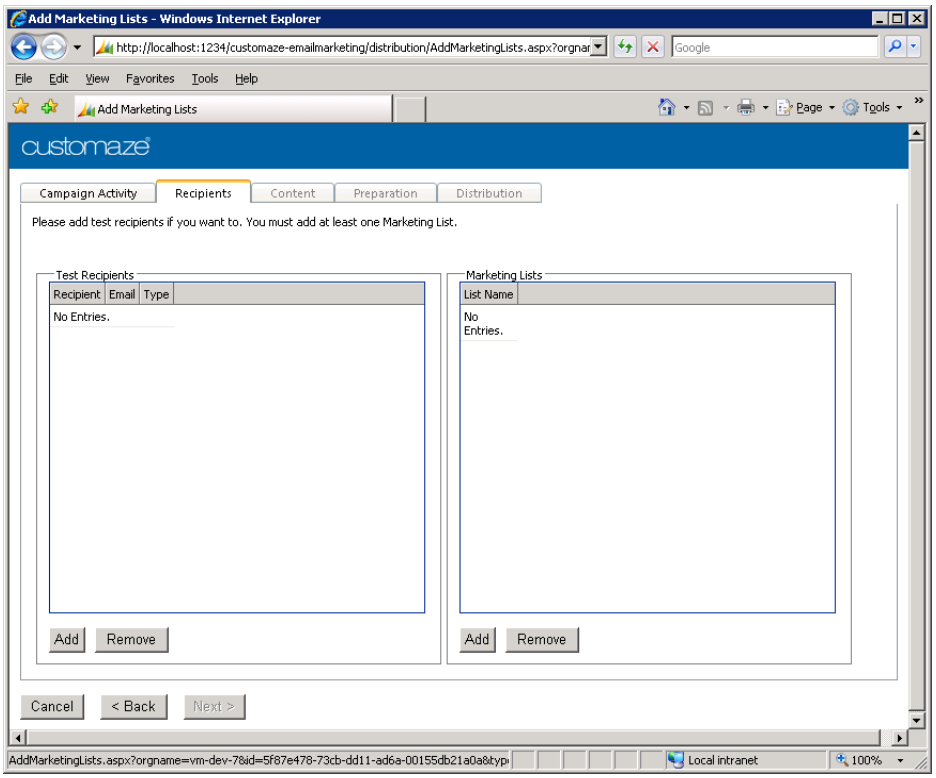
1. Click “EMM Wizard” in the Navigation Bar of the Campaign
2. Click “Create new Activity” to start the Wizard



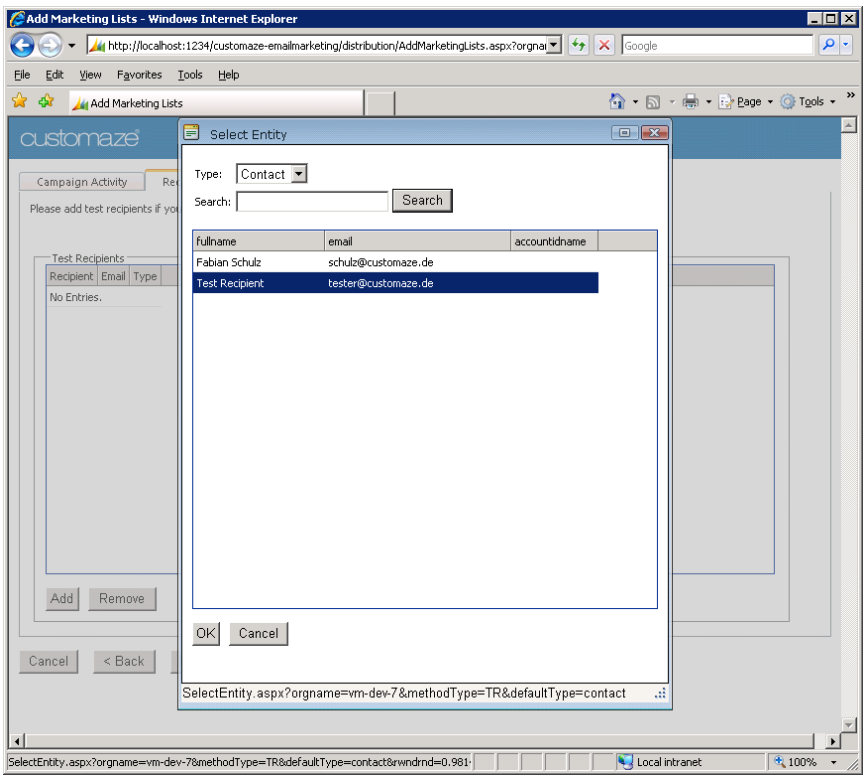
Enter a name for the Activity and click “Next”:



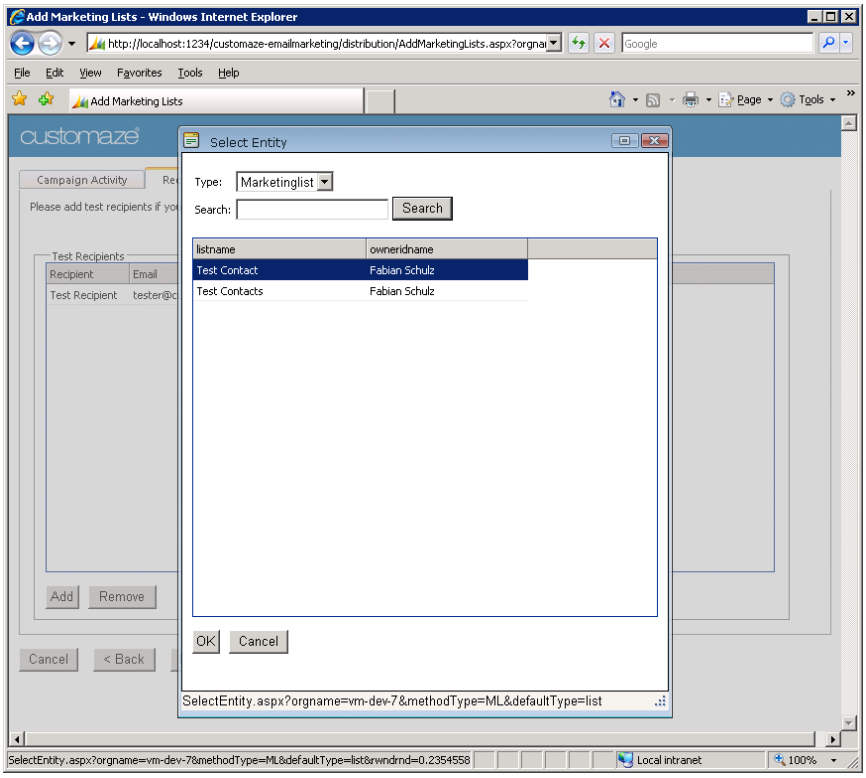
Now we're going to add the test contact and the test marketing list to the Campaign Activity:



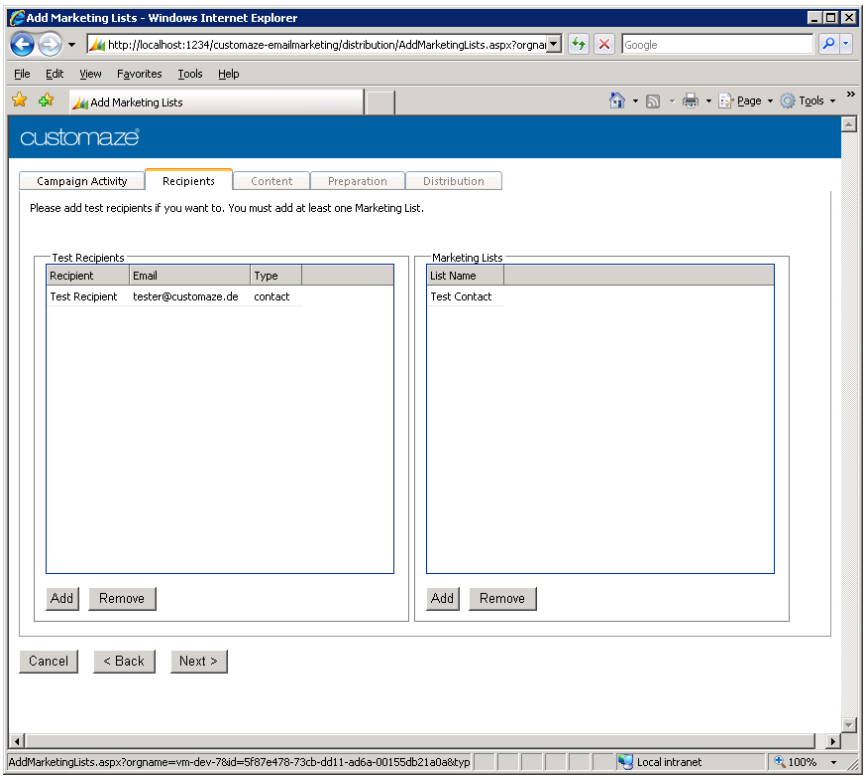
Click "Add" in the left pane labeled "Test Recipients". Click your test recipient and click "OK":



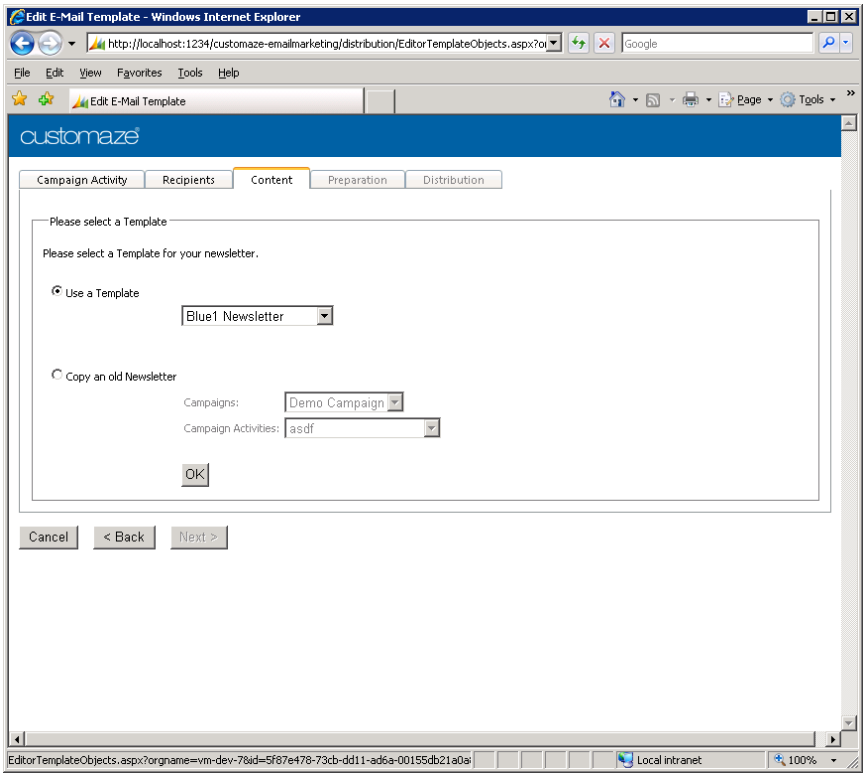
Click "Add" in the right pane "Marketing Lists". Select the test Marketing List and click "OK":



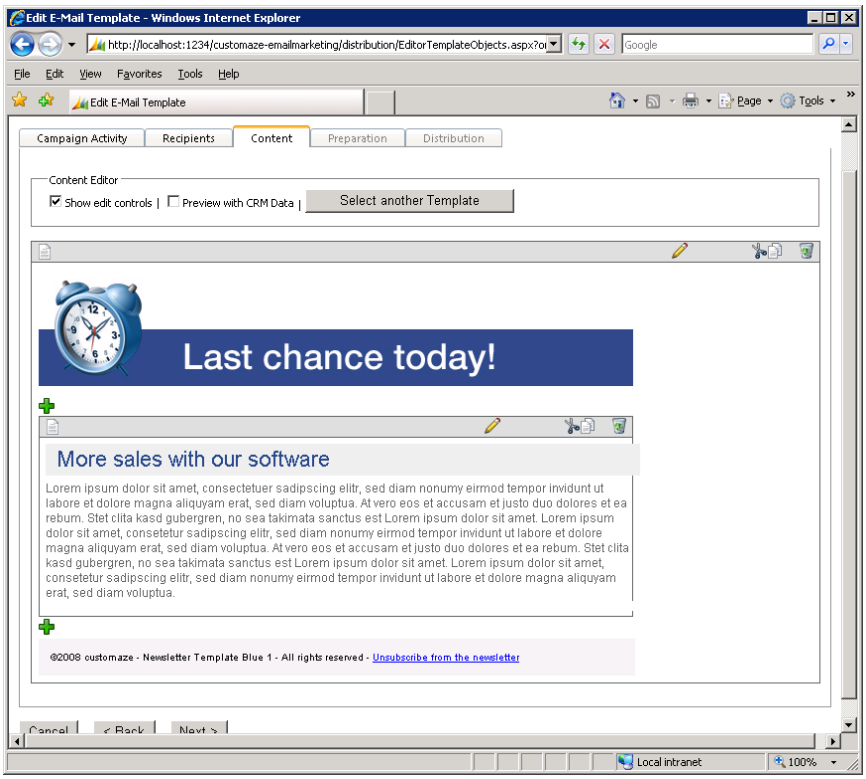
The result should look like the following screenshot. Click “Next”.



Now you’re asked whether to use a template or copy and existing newsletter. Select to use a template and click “OK”:

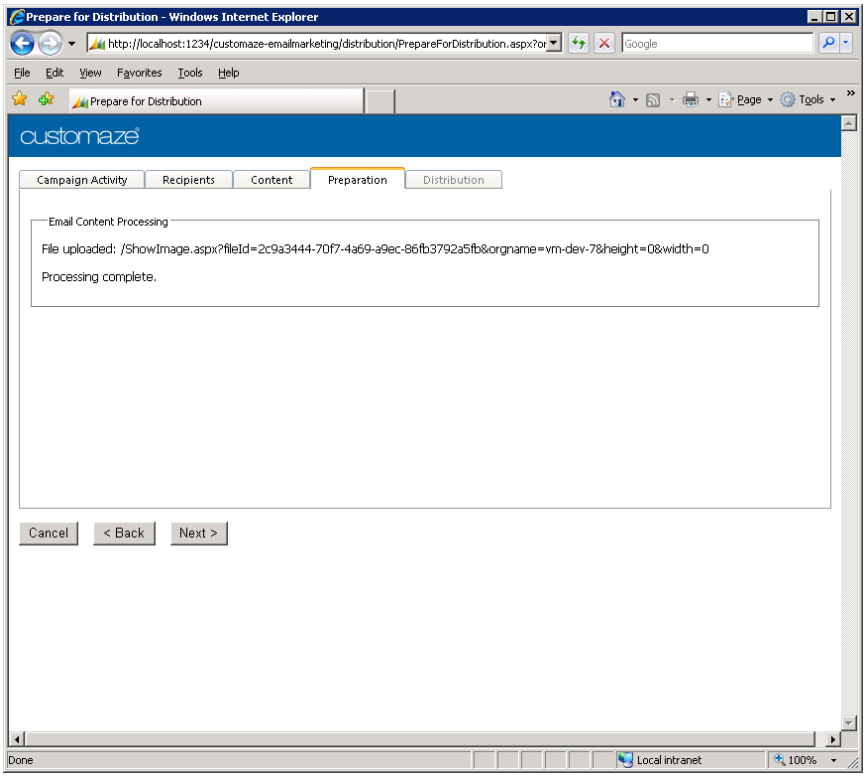


Edit the newsletter using the “plus” and “pencil” symbols. Then click “Next”.


Edit E-Mail Template - Windows Internet Explorer
Campaign Activity
Recipients
Content
Preparation
Distribution
Content Editor
Show edit controls
Preview with CRM Data
Select another Template
Last chance today!
More sales with our software
Lorem ipsum dolor sit amet, consectetuer sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua. At vero eos et accusam et justo duo dolores et ea rebum. Stet clita kasd gubergren, no sea takimata sanctus est Lorem ipsum dolor sit amet. Lorem ipsum dolor sit amet, consetetur sadipscing elitr, sed diam nonumy eirmod tempor invidunt ut labore et dolore magna aliquyam erat, sed diam voluptua.
©2008 customaze - Newsletter Template Blue 1 - All rights reserved - Unsubscribe from the newsletter

Step 6: Content Preparation

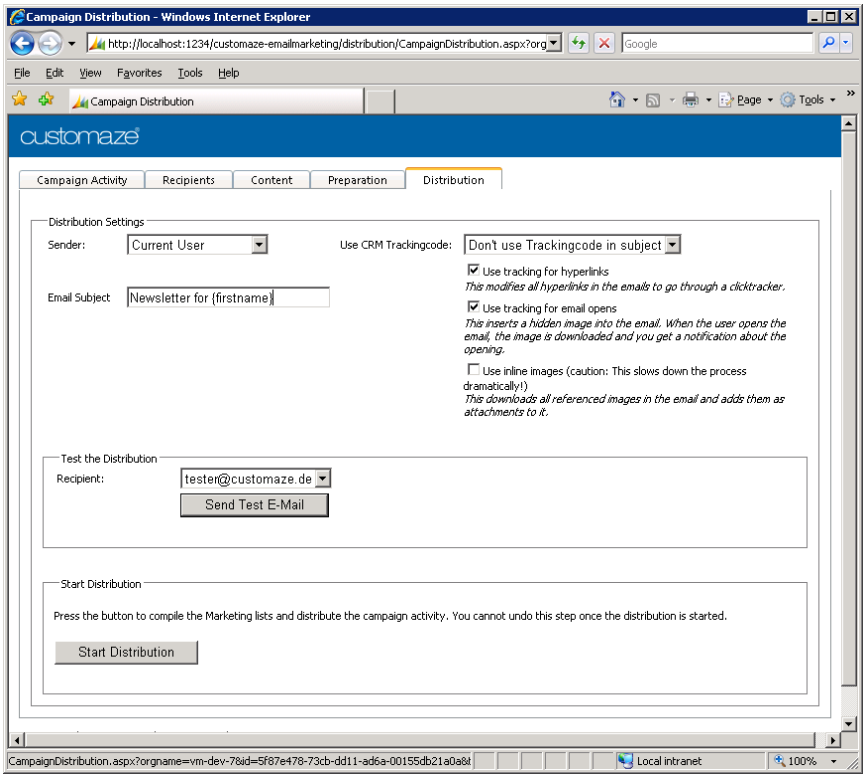
This step is informational only. When there are no error messages, click “Next”.



Step 7: Distribution

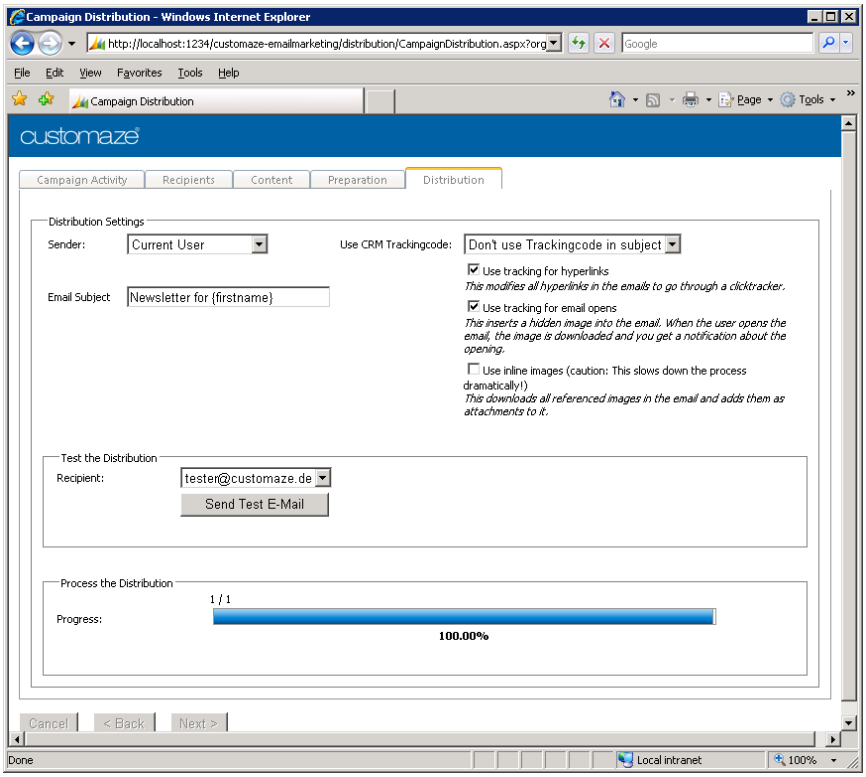
You can test the distribution now with your test contact and then distribute it to the marketing list you added earlier to the activity.

1. Enter a subject for your email. You can use fields here, too. Use “Newsletter for {firstname}” for this example
2. Click “Send Test Email” and verify that the email looks OK in the email client
3. Click “Start Distribution” to start the real distribution

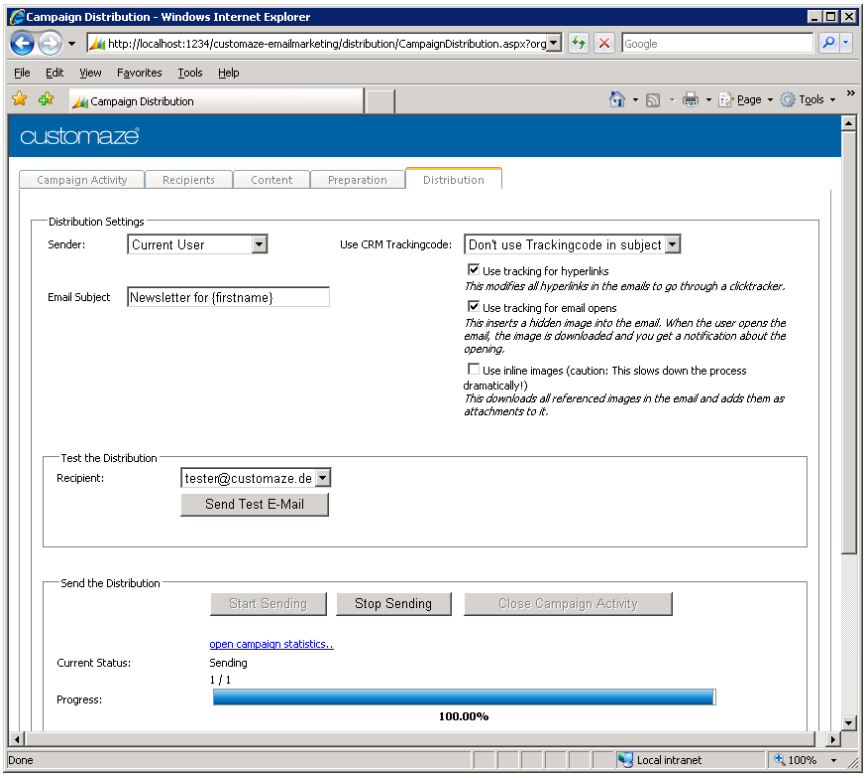

Campaign Distribution - Windows Internet Explorer
customaze
Campaign Activity
Recipients
Content
Preparation
Distribution
Distribution Settings
Sender:
Current User
Use CRM Trackingcode:
Don't use Trackingcode in subject
Use tracking for hyperlinks
This modifies all hyperlinks in the emails to go through a clicktracker.
Email Subject
Newsletter for {firstname}
Use tracking for email opens
This inserts a hidden image into the email. When the user opens the email, the image is downloaded and you get a notification about the opening.
Use inline images (caution: This slows down the process dramatically!)
This downloads all referenced images in the email and adds them as attachments to it.
Test the Distribution
Recipient:
tester@customaze.de
Send Test E-Mail
Start Distribution
Press the button to compile the Marketing lists and distribute the campaign activity. You cannot undo this step once the distribution is started.
Start Distribution

The distribution process is divided in two parts. In the first part, the emails are created in Microsoft CRM. The second part sends them to the recipients.

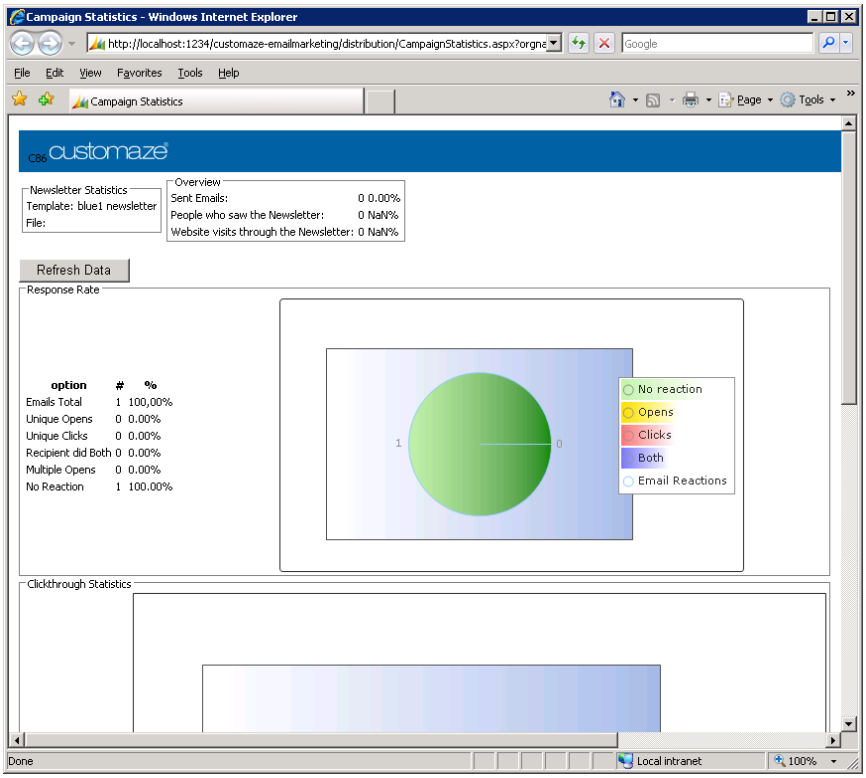
The first part is non-interruptible, so there's only a progress bar there:



The second part, where the emails are actually sent, is interruptible. That means you can click "Stop" at any time. When you start again, only those mails that are not yet processed are sent out. That means that your recipients won't get the email twice, regardless how often you click "Stop" and "Start".



When the process is finished, click “Close Campaign Activity” to update its status in Microsoft CRM. Then click “Open Campaign Statistics”.



Congratulations! You have just sent your first newsletter.

The Template Language

You have a very advanced tool at hand with the integrated Template Language. But as it comes with powerful tools, it is hard to use. But the work will pay back.

Once you have learned the Template Language, you can do things like:

- Create a fully automated signature for your users
- Create an automated salutation which works for multiple languages
- Create a template which automatically looks up the date the last activity happened with the recipient (for instance in an email reply: "Thanks for your mail from …").

Short Overview

Insert a field: {firstname} – inserts the field "firstname" from the recipient

Check a condition: {if firstname startswith "anton"}You are Anton{end if}

Insert a command: [include "common/template.htm"] – insert some other file

Inserting field data

Insert recipient's field data

The syntax to insert field data is to write the field name in curly braces.

Like this: `{fieldname}`

Insert field data of related entities

It is possible to insert field data of entities that are referenced by the recipient.

Syntax: `{referencingfield: fieldname}`

The first part is the field in the recipient entity that references the entity you want to retrieve data from. An example: You want to insert the company name of the parent customer of a contact.

So the recipient of the email would be the contact and the parent customer of that contact would be the company the contact belongs to.

The field in contact that points to the parent customer has the name: parentcustomerid

And the field in account that contains the company name has the name: name

So the full syntax would be: `{parentcustomerid: name}`

You can go through multiple levels with this, for instance:

`{parentcustomerid: ownerid: fullname}`
to insert the full name of the owner of the company that is the parent of the contact, who is the recipient of the email.

There is a special referencing attribute named emailowner, which is used to insert data of the email owner.

Using Conditions

Conditions in the Template Language are a simple yet powerful concept to insert data depending on data contained in the recipient's entity.

The structure of the conditions is the same for all conditions:

`{if operator "expression"}`*things to insert if condition is true*`{end if}`

Operators

Equals

Synopsis: `{if fieldname equals "value"}body{end if}`

Example: `{if new_language equals "english"}EN{end if}`

The operator equals trims whitespace from begin and end and compares case insensitive.

Startswith

Synopsis: `{if fieldname startswith "value"}body{end if}`

Example: `{if salutation startswith "mrs"}female{end if}`

The operator startswith trims whitespace from begin and end and compares case insensitive from the beginning. A match occurs, when all characters from value are found in the beginning of the field's data. This is the preferred operator for string comparison.

Greater and Less

Synopsis: `{if fieldname greater "value"}body{end if}`

Example: `{if creditlimit greater "1500"}You have credit.{end if}`

Example: `{if creditlimit less "100"}No credit.{end if}`

The operators greater and less try to parse the field data and the value as decimal values.

Isnull and Hasdata

Synopsis: `{if fieldname isnull ""}body{end if}`

Example: `{if parentcustomerid isnull ""}No parent customer.{end if}`

Example: `{if parentcustomerid hasdata ""}{parentcustomerid: name}{end if}`

Entity Type

Synopsis: `{if entitytype equals "value"}body{end if}`

Example: `{if entitytype equals "account"}This is an account{end if}`

Example: `{if entitytype equals "contact"}{firstname}{end if}`

The entity type operator tests the entity type of the recipient of the e-mail. That can be quite useful when you want to build automatic salutations that work with accounts, contacts and leads. An example could be:

```
{if entitytype equals "account"}Dear Sir or Madam,{end if}
{if entitytype equals "contact"}Dear {firstname},{end if}
{if entitytype equals "lead"}Dear {firstname},{end if}
```

Nested Conditions (AND-Operator)

As there is no native AND operator in the template language, one has to simulate it using nested conditions.

An example to combine to conditions:

```
{if parentcustomerid hasdata ""}{if creditlimit greater "0"}Contact
has a parent and a creditlimit.{end if}{end if}
```

Opposing Conditions (ELSE-Operator)

There is not native ELSE operator in the template language. But you can easily simulate it using opposing conditions, like this example does:

```
{if parentcustomerid isnull ""}Parent is null{end if}{if
parentcustomerid hasdata ""}Parent has data.{end if}
```

Using Commands

Includes

You can use includes like in many other languages.

Synopsis: `[include "filename"]`

Example: `{if parentcustomerid hasdata ""}[include "common\account.htm"]{end if}`

The base of the path of the filename is set to the templateEditor\files\<organization>\templates directory. You can use conditions and field data inside the included files.

Setsender

Used to modify the sender of the email.

Synopsis: `[setsender "value"]`

Example: `[setsender "info@customaze.de"]`

You need to setup the provided email address as an email queue in Microsoft CRM. It is only possible

to set the sender to an email queue.

This command is useful in newsletter templates. That way you make sure every newsletter has the right sender and is not sent by the systemuser itself.

Enableclicktracking

By default, all hyperlinks are modified to enable click tracking. You can disable that for certain emails with this command.

Synopsis: `[enableclicktracking "value"]`

Example: `[enableclicktracking "false"]`

Enablewebbug

By default, all emails are marked with an invisible image to track opening of emails. You can disable that for certain emails with this command.

Synopsis: `[enablewebbug "value"]`

Example: `[enablewebbug "false"]`

Attachment

You can include attachments by using a special command. This way it is possible to use file attachments in your newsletters.

Synopsis: `[attachment "filename"]`

Example: `[attachment "pricelist.pdf"]`

The base of the path is set to "templateEditor\files\attachments".

XML-Queries

XML-Queries are a very powerful concept enabling you to insert data that is otherwise not referenced directly by the entity. You use the syntax provided in the Microsoft CRM Sdk "FetchXML".

Synopsis: `[query xml "value" "format"]`

Example:

```
[query xml "<fetch mapping='logical'><entity
name='phonecall'><attribute name='actualend'/><filter
type='and'><condition attribute='regardingobjectid' operator='eq'
value='#regardingobjectid#'/></filter><order attribute='actualend'
descending='true'/></entity></fetch>" "dd.MM.yyyy"]
```

The description of FetchXML is beyond the scope of this document. But you can refer to the Microsoft CRM Sdk. When fetching a datetime value, you can provide a format as in DateTime.ToString (format), see MSDN for details.

Plugin Interface – custom code during the send process

The plugin interface enables you to implement custom code that runs during the distribution process. This is useful to integrate data from external systems into your e-mail. An example would be to query an ERP system for former purchases of the recipient and offer them related products in the e-mail.

But it would be also possible to implement conditions that are too difficult to be expressed in our template language.

Programming for the interface is very easy. See this class as a simple example of such a plugin:

```
namespace theDynamicDLL
{
    public class Class1
    {
        private DateTime _createdOn = DateTime.MinValue;

        public Class1()
        {
            _createdOn = DateTime.Now;
        }

        public void Process(
            string toEntityType, Guid toEntityId,
            string regardingobjectEntityType, Guid regardingobjectEntityId,
            string fromEntityType, Guid fromEntityId,
            string ownerEntityType, Guid ownerEntityId,
            ref string subject,
            ref string description
            )
        {
            subject += DateTime.Now.ToString();
            description += "\r\nTo: " + toEntityType + ", " + toEntityId.ToString()
                + "\r\nRegarding: " + regardingobjectEntityType + ", " +
regardingobjectEntityId.ToString()
                + "\r\nFrom: " + fromEntityType + ", " + fromEntityId.ToString()
                + "\r\nOwner: " + ownerEntityType + ", " + ownerEntityId.ToString();
        }
    }
}
```

The only method that needs to be implemented is the Process method. The parameters must match the example exactly.

Technical details:

- During the send process, the class is instantiated ONCE – not for every e-mail, but only once at the beginning of the process. So it is no problem to do costly processing in the default constructor – it is only executed once.
- There is an exception: If you use E-Mail Marketing as a plugin for each and every e-mail (this is not the default, but you can configure it that way), the class is instantiated for every e-mail. This is due to technical limitations and must be considered only when you use the plugin.
- The subject and description are passed by reference. Description contains the whole e-mail including all HTML markups.
- All field replacements and include instructions are processed before the plugin is called.
- Click through / e-mail opened tracking is inserted after the plugin is called. When you insert links into the e-mail they will be tracked by the tracking server too.

How to activate the plugin step by step:

a) Create a class library project in Visual Studio
b) Use the sample code from above for your first "Hello World" project
c) Build the project, copy the DLL into a directory on the CRM server. The DLL must be readable by the identity the Distribution Service uses. Exception: When the plugin is used, it must be readable by the identity the Asynchronous Service uses.
d) Open up Regedit and go to HKLM\Software\customaze Email Marketing\<organization name>
e) Create these keys:
    a. DLLPath = The full path to the DLL on the CRM server. Example: C:\Temp\theDynamicDLL.dll
    b. DLLClassname = Name of the class including the namespace. Example: theDynamicDLL.Class1 (uppercase / lowercase matters here, so be careful)
f) That's it. No restart or anything similar required. The next distribution uses the DLL.

Workflow extensions

The email marketing tool comes with extensions to the CRM workflow manager. These workflow methods can be used to achieve tasks related to the email marketing add-on, but they can be used stand alone as well.

Group customaze

Get Email Reaction count from Email

Input Properties: Email (email)

Output Properties: EmailReactionCount (int)

Purpose: This method returns the number of Email Reactions that were created in reaction to the given email or 0 if there are no reactions yet.

Usage scenario: Create a workflow for each email sent from your CRM system that waits for 24 hours and then checks if there are email reactions. If not, send a reminder email “did you receive our email?”.

Is Campaign Email

Input Properties: Email (email)

Output Properties: IsCampaignEmail (boolean)

Purpose: Returns true if the given email is regarding a campaign activitiy.

Usage scenario: This workflow method is used to automatically send out campaign emails.

Is Regex Match

Input Properties: Input (string), Regex (string)

Output Properties: IsRegexMatch (boolean)

Purpose: Returns true if the Input matches the Regular Expression.

Usage scenario: This method is very multi-purpose. You could use it for instance to pre-sort incoming emails based on their subject or body.

Process incoming Data Email

Input Properties: Email (email)

Output Properties: none

Purpose: Processes special data emails sent from the clicktracking service. If the email has been processed correctly, it is automatically deleted.

Usage scenario: Use this for the click tracking workflow

Send Campaign Email

Input Properties: Email (email), UseTrackingCode (boolean)

Output Properties: none

Purpose: Sends open email activities. Either with the CRM tracking code (CRM:001234) in the subject or without it.

Usage scenario: Use this in the “Send Campaign Email” workflow.

customaze Template Emails

Send Template Email from X to Y

These workflow extensions are meant to send emails using templates (not CRM email templates but those used in the Template Editor) with different sender and recipient types.

The extensions having an “Email Reaction” in their name are meant to be used in reaction to an email reaction – for instance in a workflow reacting on Email Reactions. They reply to the account, contact or lead who has triggered the Email Reaction.

Input Properties:

- Recipient (account, contact, lead)
- Sender (systemuser, queue)
- TemplateFile (string) – the template to use. Use a relative path starting in files\templates\
- Subject (string) – the email’s subject
- SendEmail (boolean) – should the email be sent out or just be created
- UseTrackingToken (boolean) – if the email should be send with the CRM tracking token

customaze List Management

Add X to List

As the name implies, these workflow extensions are meant to automatically add an account, contact or lead to a marketing list. If the member already exists in the list, nothing happens.

The extensions having an “Email Reaction” in their name are meant to be used in reaction to an email reaction – for instance in a workflow reacting on Email Reactions. They would add the account, contact or lead who has triggered the Email Reaction to the marketing list.

Input Properties:

- Member (account, contact, lead, email reaction)
- List (marketing list)

Is X Member of List

This workflow extension returns true if the given account, contact or lead is member of the given marketing list.

The extensions having an “Email Reaction” in their name are meant to be used in reaction to an email reaction – for instance in a workflow reacting on Email Reactions. They would check if the account, contact or lead who has triggered the Email Reaction is a member of the marketing list.

Input Properties:

- Member (account, contact, lead, email reaction)
- List (marketing list)

Output Properties:

- IsXMemberOfList (boolean)

Remove X from List

These workflow extensions remove the given account, contact or lead from the given marketing list. If the account, contact or lead is not a member of the marketing list, nothing happens.

The extensions having an “Email Reaction” in their name are meant to be used in reaction to an email reaction – for instance in a workflow reacting on Email Reactions. They would remove the account, contact or lead who has triggered the Email Reaction from the marketing list.

Input Properties:

- Member (account, contact, lead, email reaction)
- List (marketing list)

Role based access to E-Mail Marketing

If you want to restrict access to e-mail marketing to a specific group of users, you'll want to implement the role based access. Keep in mind that this is not a real security feature. It just turns off the welcome screen of E-Mail Marketing. If the users know the URL of the Control Center, it is still possible for them to access the templates.

Implement role based access:

a) Create a new security role in CRM. Name doesn't matter, but "E-Mail Marketing" would make sense
b) On the CRM server, open up Regedit
c) Go to HKLM\Software\customaze Email Marketing\<organization name>
d) Create a new string value named "Role" with the value set to the name of the security role. In this example the value would be "E-Mail Marketing"
e) The setting is active immediately. The next time a non-authorized user opens up the EMM Wizard page in the campaign, they'll get an access denied message.

Integration Scenarios

Wrapping the previous chapters up, we want to show you how you can achieve common goals when automating the email marketing with your CRM system.

Multi-language auto-salutation template

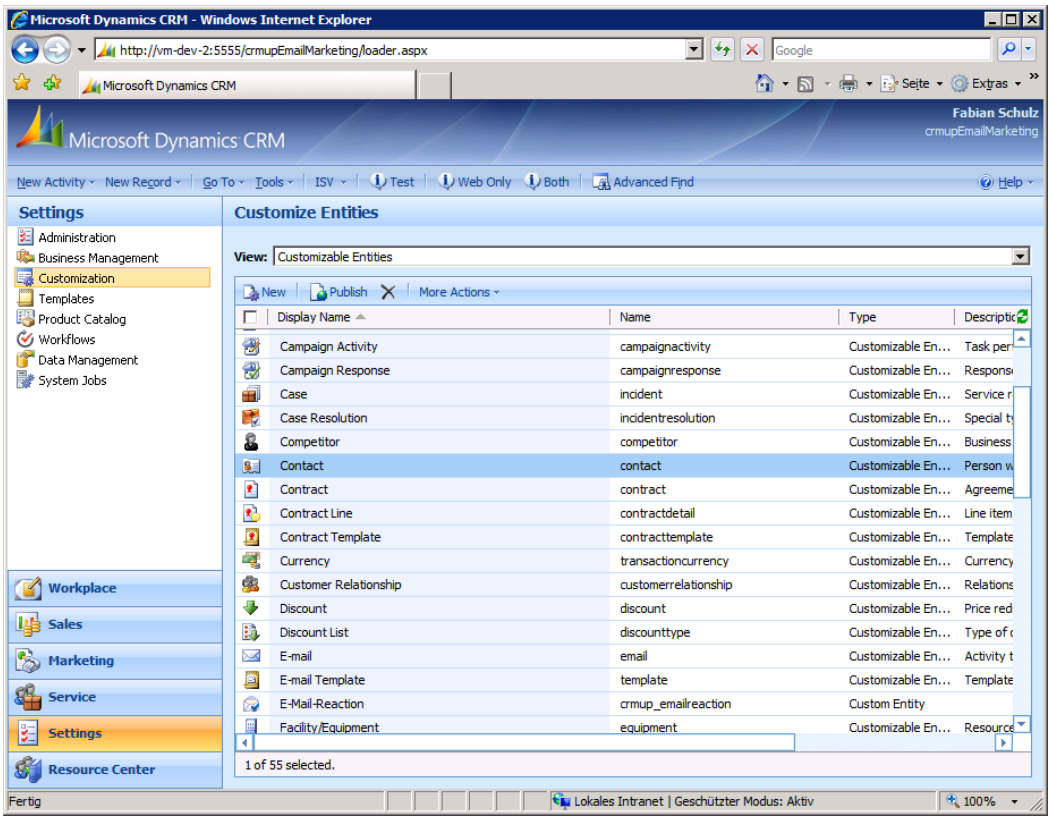
What will be achieved in this scenario?

- One template that can be used to write emails to English and German-speaking customers
- One template that can be used to write formal and informal emails

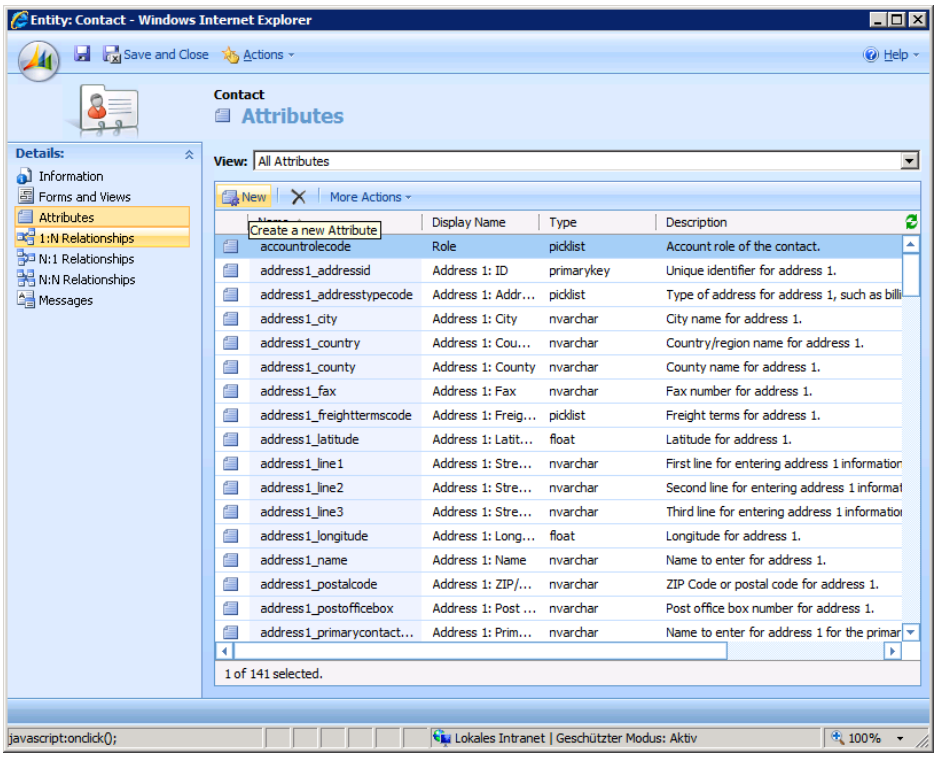
Modifications to the CRM

We're going to modify the contact entity to have two additional fields: Salutation and Language.

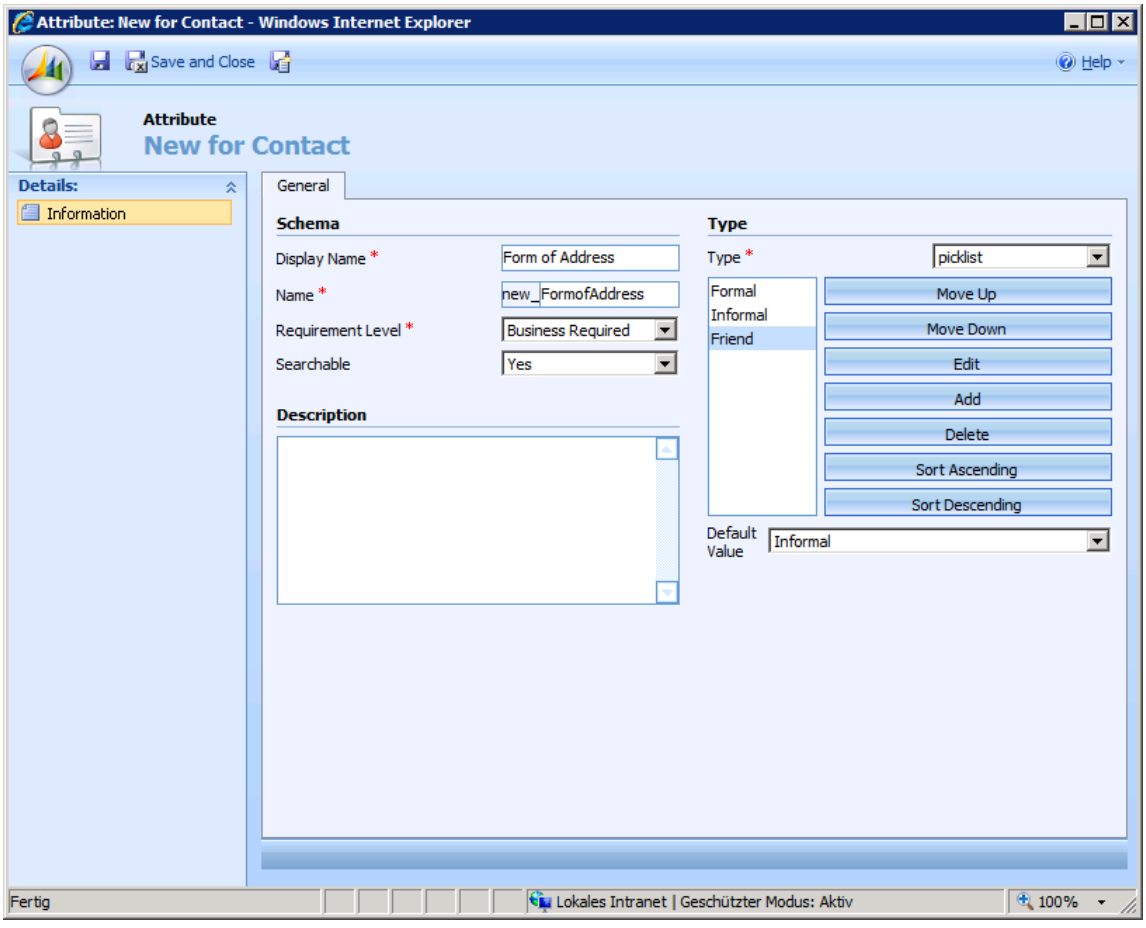
Go to Settings / Customization. Double Click the Contact entity.



In the contact entity, click “Attributes” in the menu on the left. Click New to create a new Attribute.

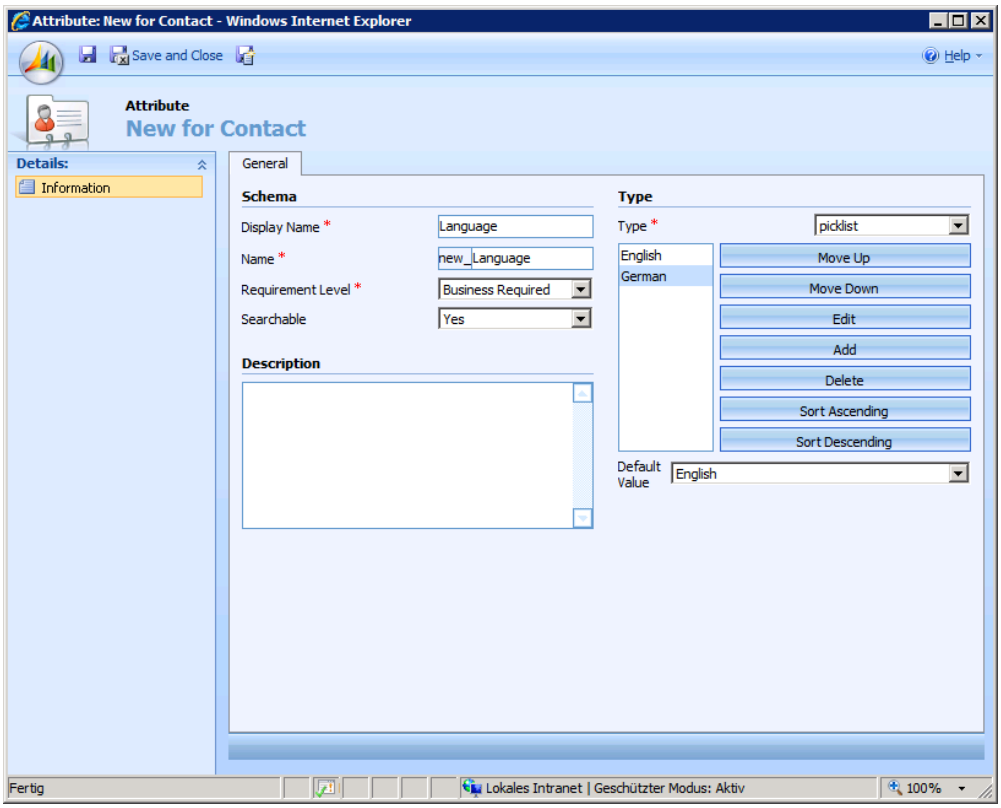


Create the attribute like this screenshot:



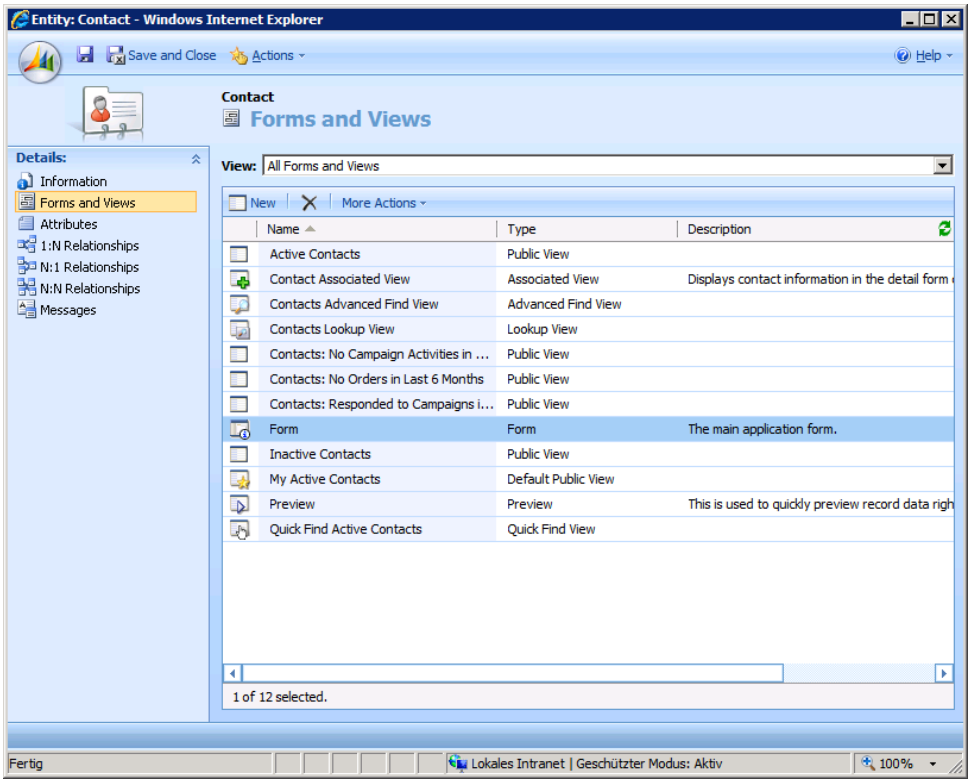
Click “Save and Close”

Create a second attribute like this:

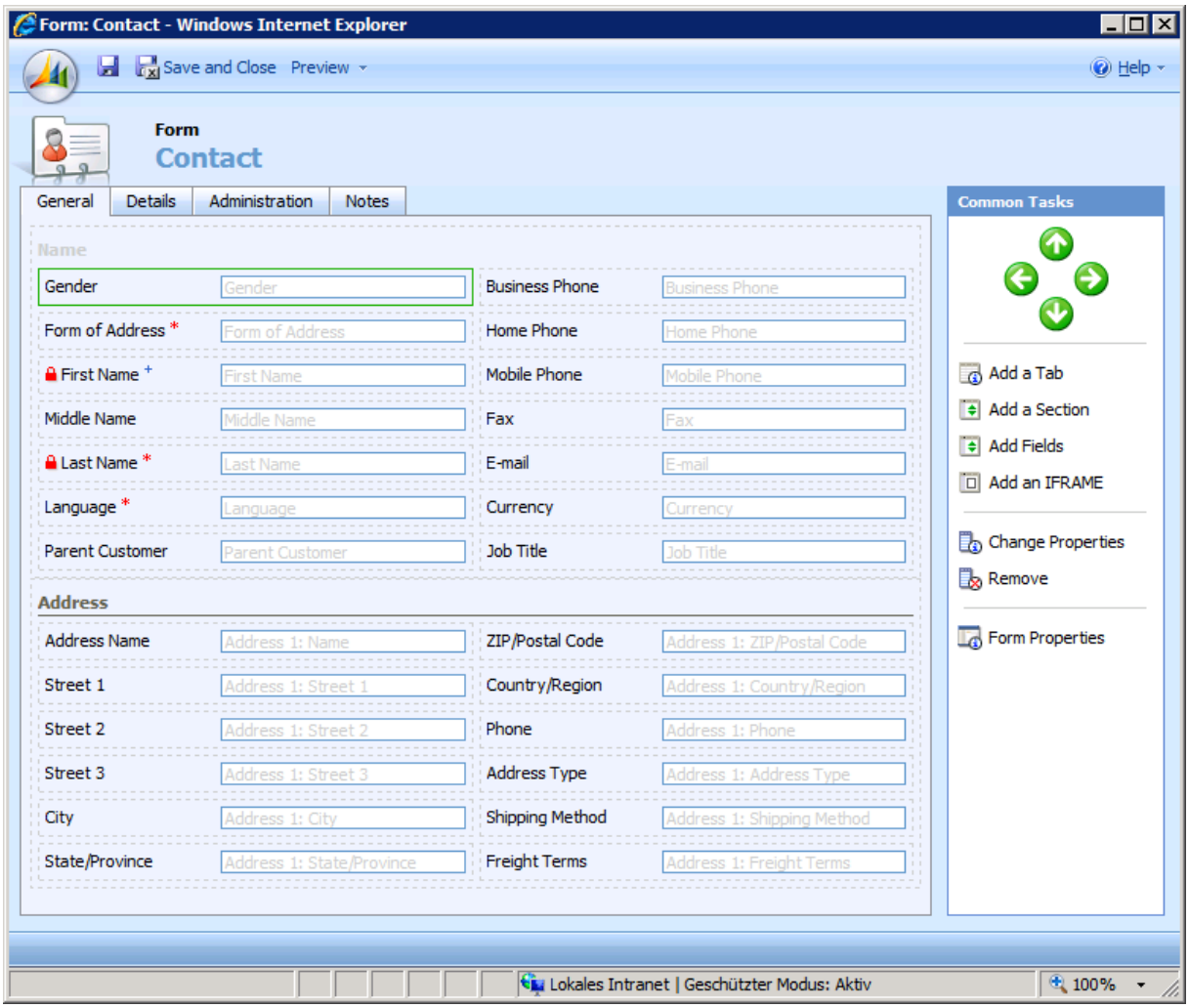


Click “Save and Close”.

In the Contact Entity, go to “Forms and Views” in the menu on the left and double click “Form”.



Add the fields you just created to the contact form and move them around to look like this:



Save and Close the form.

Click “Actions – Publish” to publish your customizations.

Creating the template

Even if the Template Editor is mighty enough to handle most requirements, it is a bad idea to use it to create complex templates. They are very much superior programs available to do this (Dreamweaver, Expression Web or even Visual Studio to name just a few).

And it is easy to use these programs to create the template. Just Share the folder c:\Program Files\customaze Email Marketing\website\files on the server running Microsoft CRM. You can then access all the template files easily with the program of your choice.

In this example, we will create only trivial HTML and thus we will be using notepad for that purpose.

Our template will consist of three parts:

- A header containing some HTML and the salutation (header.htm)

- A footer containing the greeting and signature (footer.htm)
- An email template including both of the other templates (default.htm)

The overall Idea of the template is to have a table based layout with a fixed width to demonstrate how to handle the special requirements a table based layout creates.

The Header Template

Create a file with the HTML editor of your choice (we're using notepad for this example).

Copy and paste the following code into the template:

```
<table width="400">

<tr><td bgcolor="navy"> </td></tr>

<tr><td>

{if new_formofaddress startswith "formal"}

        {if new_language startswith "german"}Sehr geehrte{if gendercode startswith "male"}r{end
if} {lastname},{end if}

        {if new_language startswith "english"}Dear {if gendercode startswith "male"}Mr{end
if}{if gendercode startswith "female"}Mrs{end if} {lastname},{end if}

{end if}

{if new_formofaddress startswith "informal"}

        {if new_language startswith "german"}Hallo {if gendercode startswith "male"}Herr{end
if}{if gendercode startswith "female"}Frau{end if} {lastname},{end if}

        {if new_language startswith "english"}Hello {if gendercode startswith "male"}Mr{end
if}{if gendercode startswith "female"}Mrs{end if} {lastname},{end if}

{end if}

{if new_formofaddress startswith "friend"}

        {if new_language startswith "german"}Hallo {firstname},{end if}

        {if new_language startswith "english"}Hello {firstname},{end if}

{end if}
```

Save the file as header.htm in the share you created in the step before (the file should be located in C:\Program Files\customaze Email Marketing\website\files\templates on the server running Microsoft CRM).

The Footer Template

The footer template contains a greeting and a simple signature and closes the table the Header Template has opened. It is important that you create this template using an external tool (do not use the integrated Template Editor), because the integrated Template Editor cannot handle the Email link correctly.

```
<br />

{if new_language startswith "english"}With best regards{end if}{if new_language startswith
"german"}Mit freundlichen Grüßen{end if},

<table width=”300”>

<tr><td colspan=”2”><b>{emailowner: firstname} {emailowner: lastname}</b></td></tr>

<tr><td>Email:</td><td><a href="mailto:{emailowner: internalemailaddress}">{emailowner:
internalemailaddress}</a></td></tr>

</td></tr></table>
```

Save the template as footer.htm

The Email Template

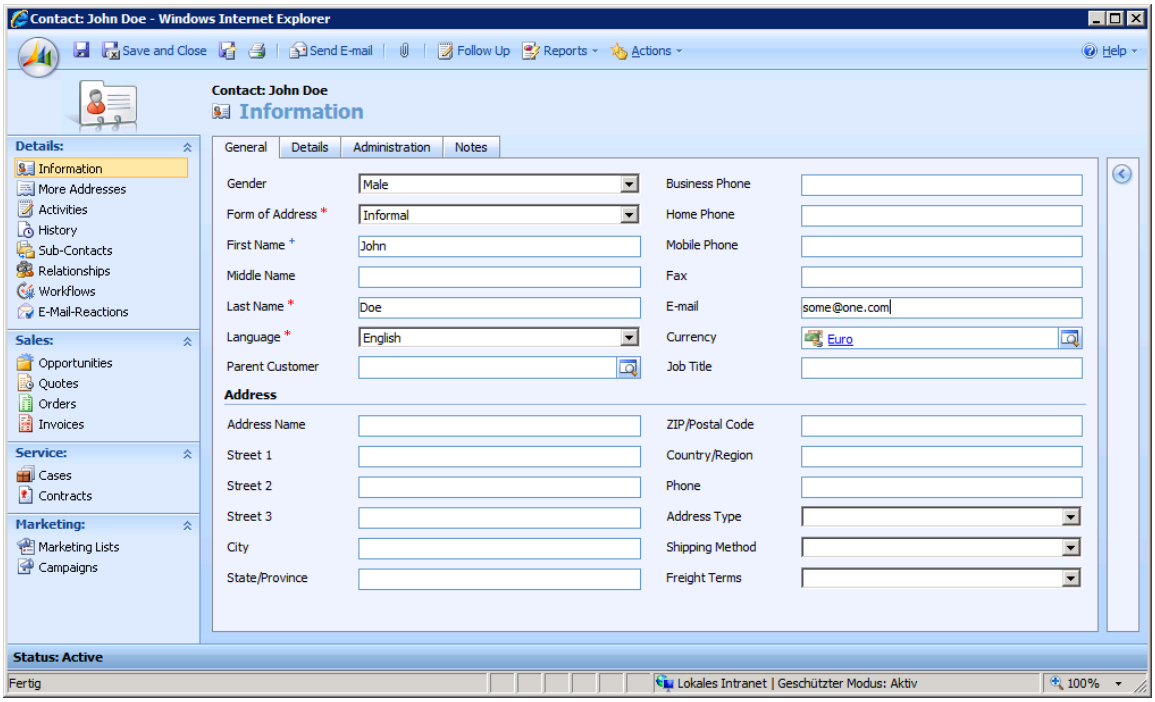
This template combines both templates. This is the template the end user will actually use – the other templates will be included into this template.

```
[include "header.htm"]<br />

YourTextHere

<br />

[include "footer.htm"]
```

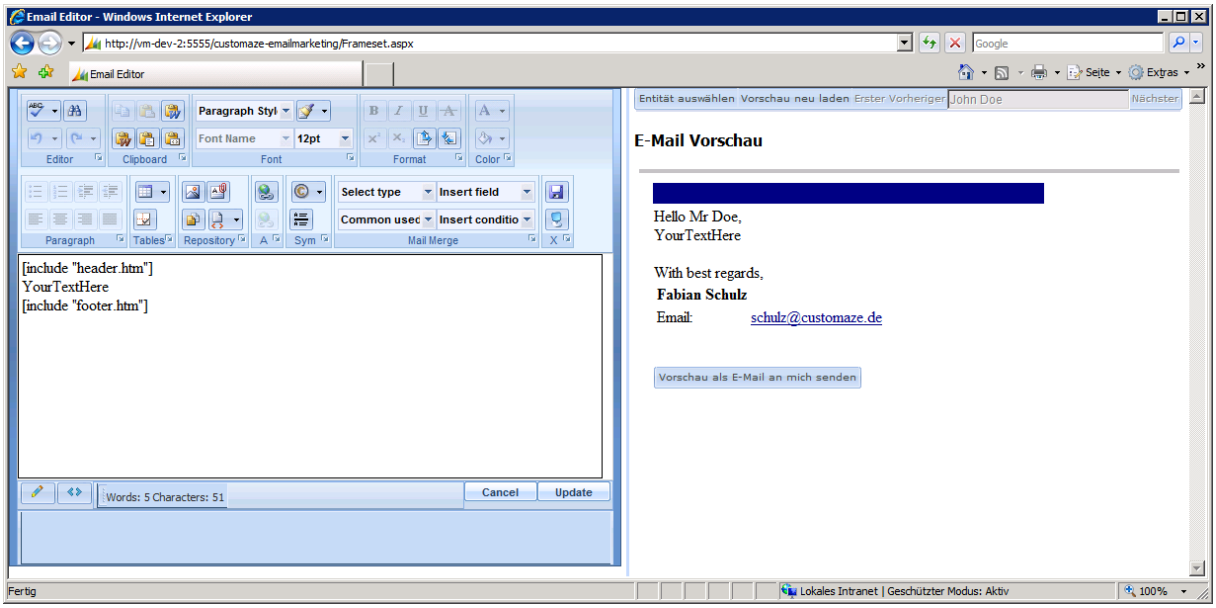
Save the template as default.htm

Test the result

Open a contact and update it to contain some data in the new fields:



Click “Send E-mail” then and open the Advanced E-Mail Editor.



This is the expected result. Most likely, it doesn't fit your imaginations about a Corporate Design. But that wasn't the purpose of this tutorial. If you need help setting up a nice HTML design, please ask your implementation partner for assistance.

What you have achieved is something other: You have a basis to build your real email template upon. And you have an automatic salutation and automatic greeting and signature that automatically changes for each logged on user.

Integrate an unsubscribe link

A common request is to integrate an unsubscribe link into newsletter emails. This can be achieved very easy using our unique workflow-enabled click tracking.

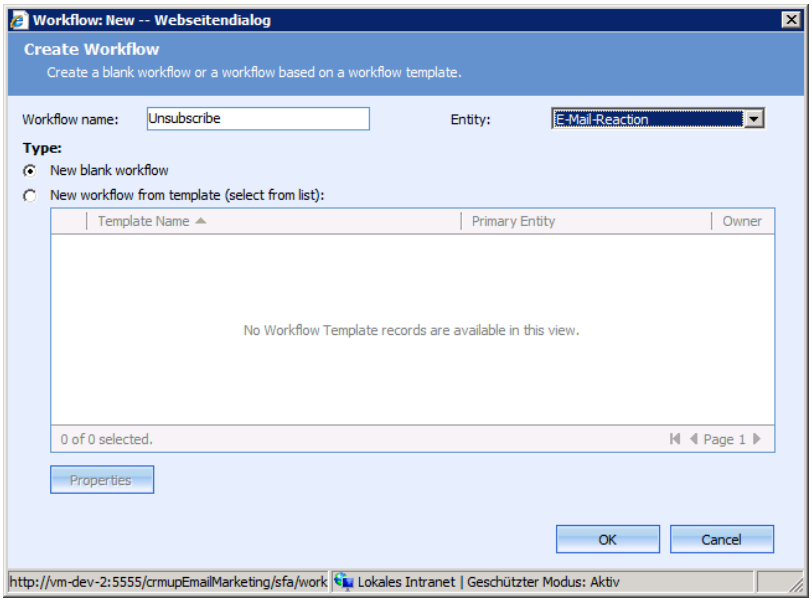
We assume that you have a website called http://www.yourdomain.com – that is an example naturally. Please modify all URLs mentioned in this tutorial. Otherwise it will not work.

Create Unsubscribe Page

Create a page on your website and give it a name like: http://www.yourdomain.com/unsubscribe.htm (the actual name doesn't matter). Write some content like "We have received your unsubscribe request. You will get an confirmation email shortly."

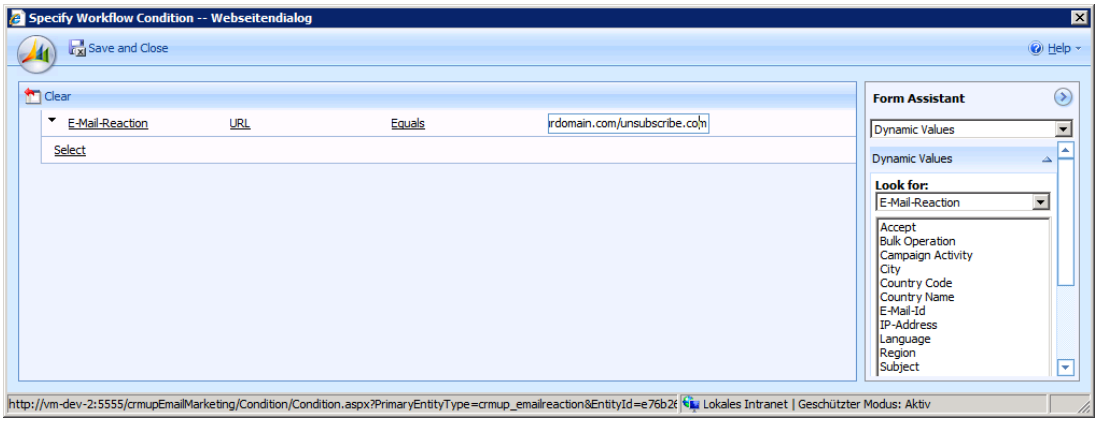
Create Workflow

Create a workflow that reacts on newly created Email Reactions. To do so, go to Settings / Workflows and click "New" to create a new workflow:



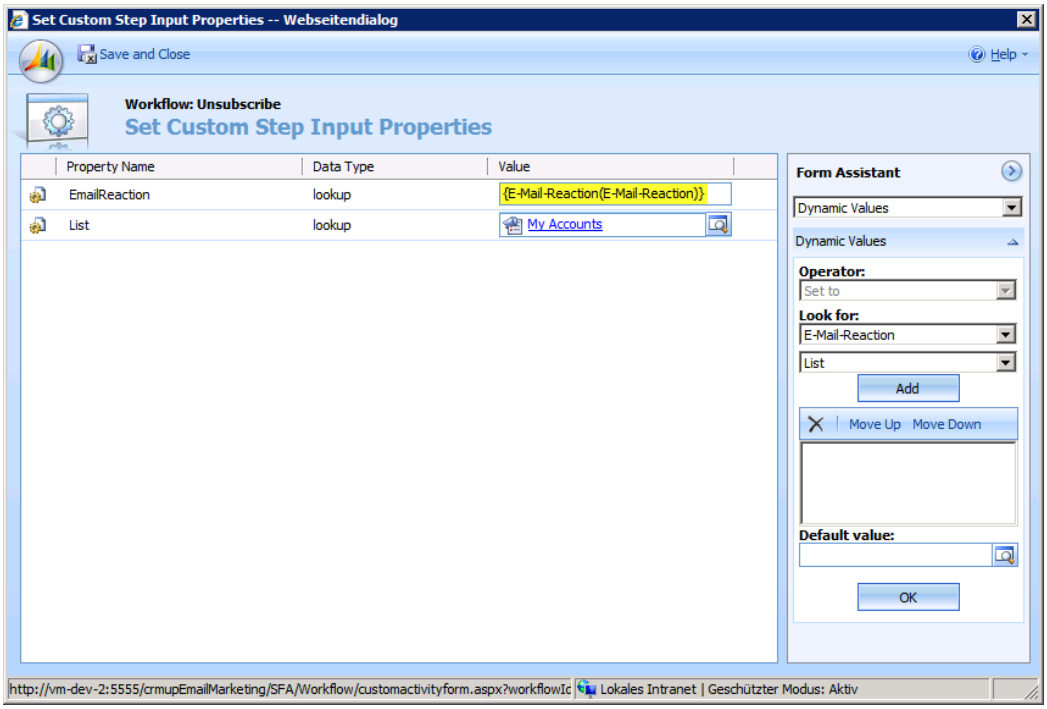
Click OK.

In the Workflow, click "Add Step – Check Condition" and check the URL to match your unsubscribe page.

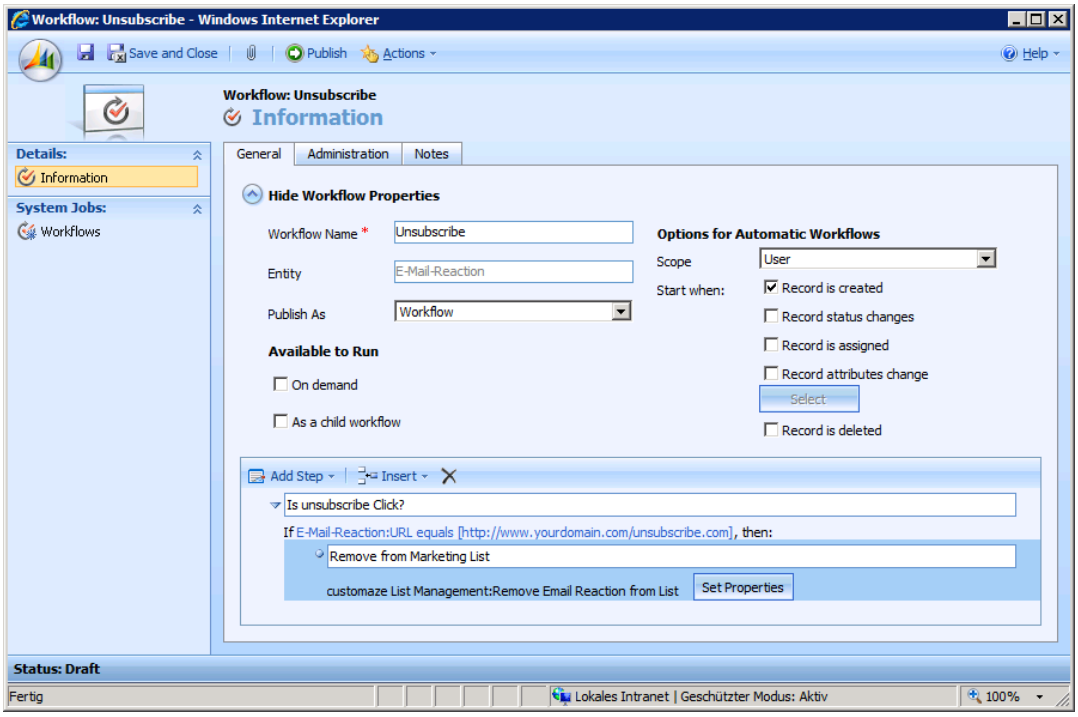

Specify Workflow Condition -- Webseitendialog
Save and Close
Help
Clear
E-Mail-Reaction
URL
Equals
rdomain.com/unsubscribe.com
Select
Form Assistant
Dynamic Values
Dynamic Values
Look for:
E-Mail-Reaction
Accept
Bulk Operation
Campaign Activity
City
Country Code
Country Name
E-Mail-Id
IP-Address
Language
Region
Subject
http://vm-dev-2:5555/crmupEmailMarketing/Condition/Condition.aspx?PrimaryEntityType=crmup_emailreaction&EntityId=e76b2
Lokales Intranet | Geschützter Modus: Aktiv

Click the “Select this Row and Click Add Step” row and click Add Step. Select “customaze - List Management – Remove Email Reaction from List”.

Set the properties of that workflow action the Email Reaction and the List you want the customer to be removed from.



The whole workflow should look like this now:



Click “Publish” to save and publish the workflow.

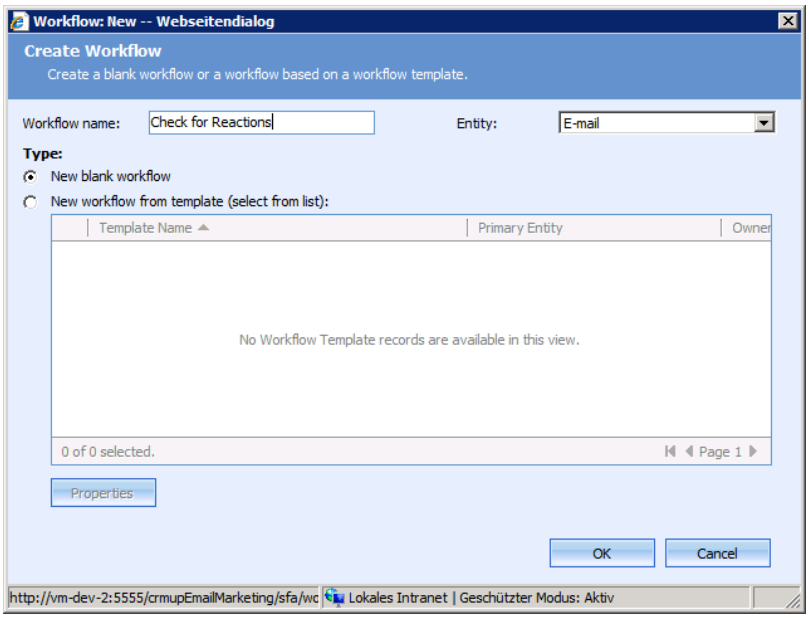
Check if your emails are opened

If you want to know if your customers open your emails, you can use the email reactions as an indicator to do so. The indicator is important here: It is always possible for an email recipient to open an email without triggering an email reaction. For the email reaction to appear, the recipient must either click a link in the email or download the images from the email.

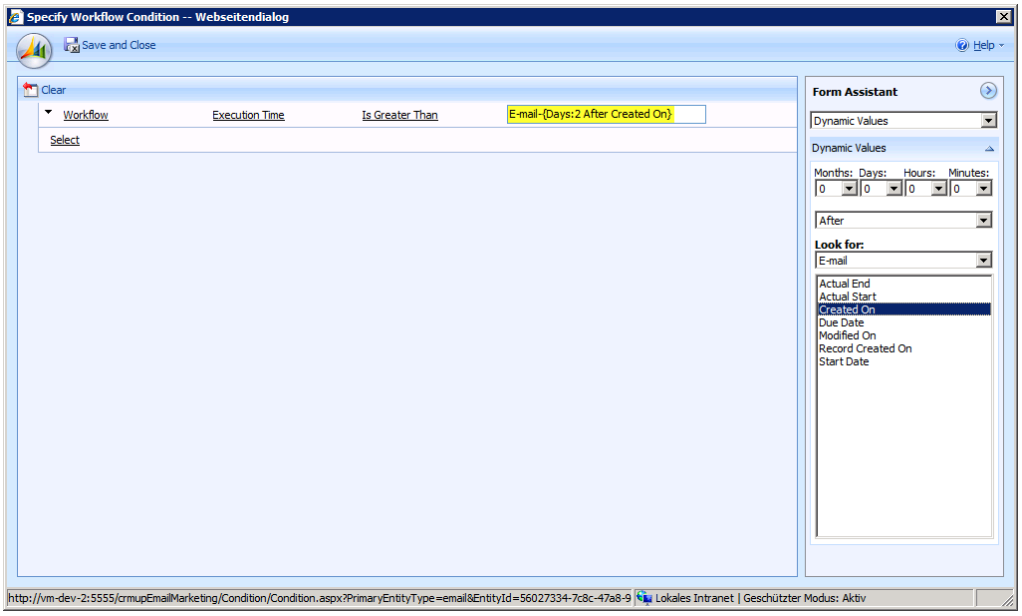
For this reason it is always a good idea to have some images in your email template which arouse the recipient's curiosity – it is much more likely that they download the invisible tracking images then.

An example of this kind of image could be a picture of each employee in the employee's signature.

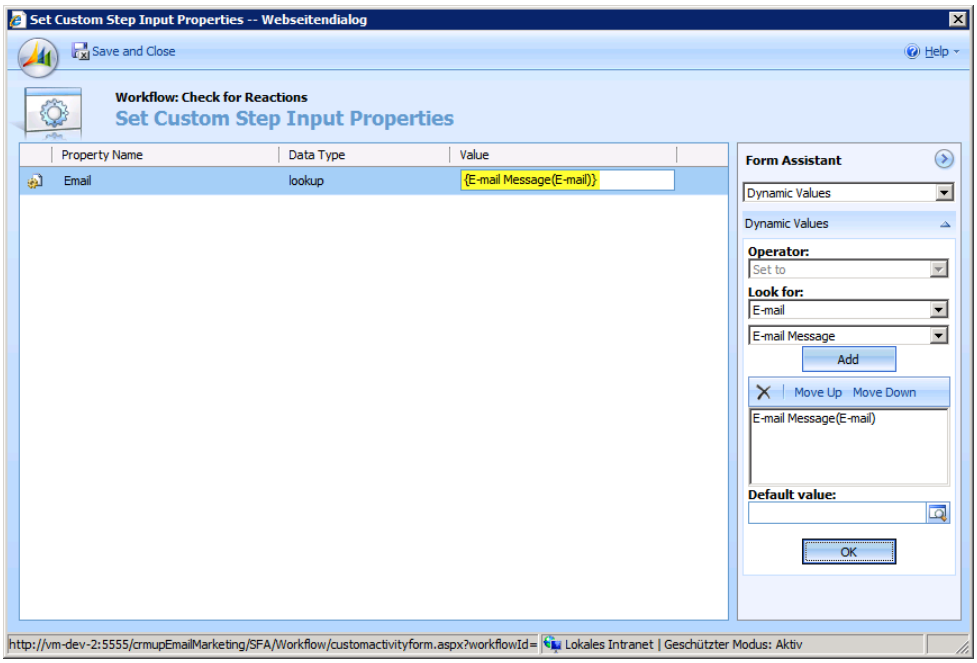
Back to the tutorial. Create a workflow that reacts on the creation of emails. To do so, go to "Settings – Workflows" and click "New" to create a new workflow.



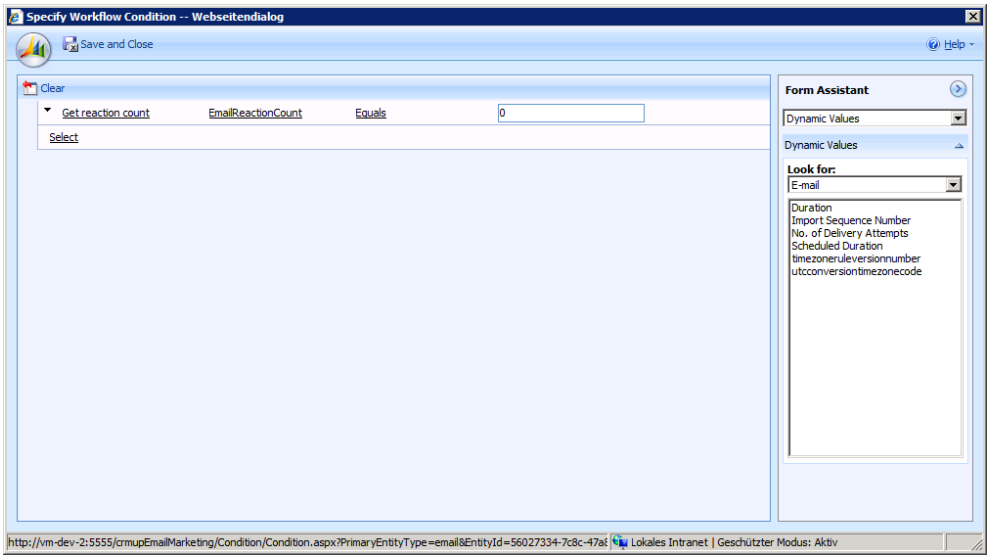
Add a Wait condition and tell it to wait two days:


Specify Workflow Condition -- Webseitendialog
Save and Close
Help
Clear
Workflow
Execution Time
Is Greater Than
E-mail-{Days:2 After Created On}
Select
Form Assistant
Dynamic Values
Dynamic Values
Months:
Days:
Hours:
Minutes:
After
Look for:
E-mail
Actual End
Actual Start
Created On
Due Date
Modified On
Record Created On
Start Date
http://vm-dev-2:5555/crmupEmailMarketing/Condition/Condition.aspx?PrimaryEntityType=email&EntityId=56027334-7c8c-47a8-9
Lokales Intranet | Geschützter Modus: Aktiv

Select the row below the wait condition and insert the “customaze - Get Email Reaction Count” action. Set the properties of that action to the email.

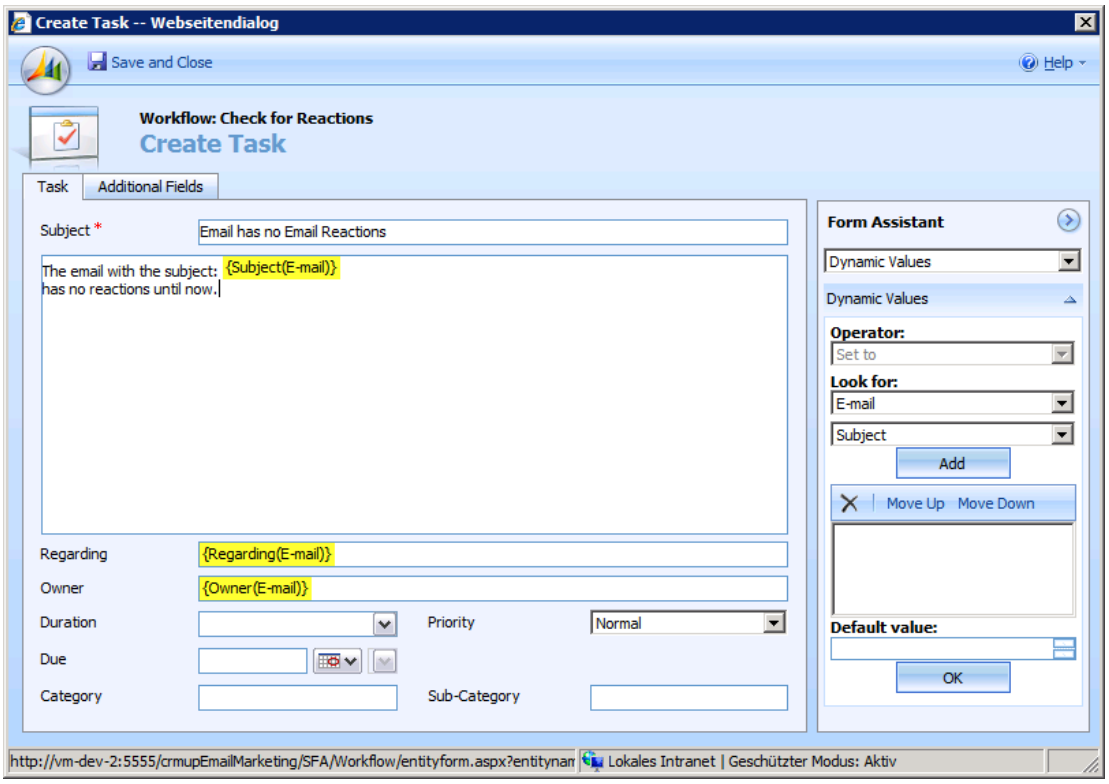


Insert a check condition after that step that checks if the Reaction Count is 0:

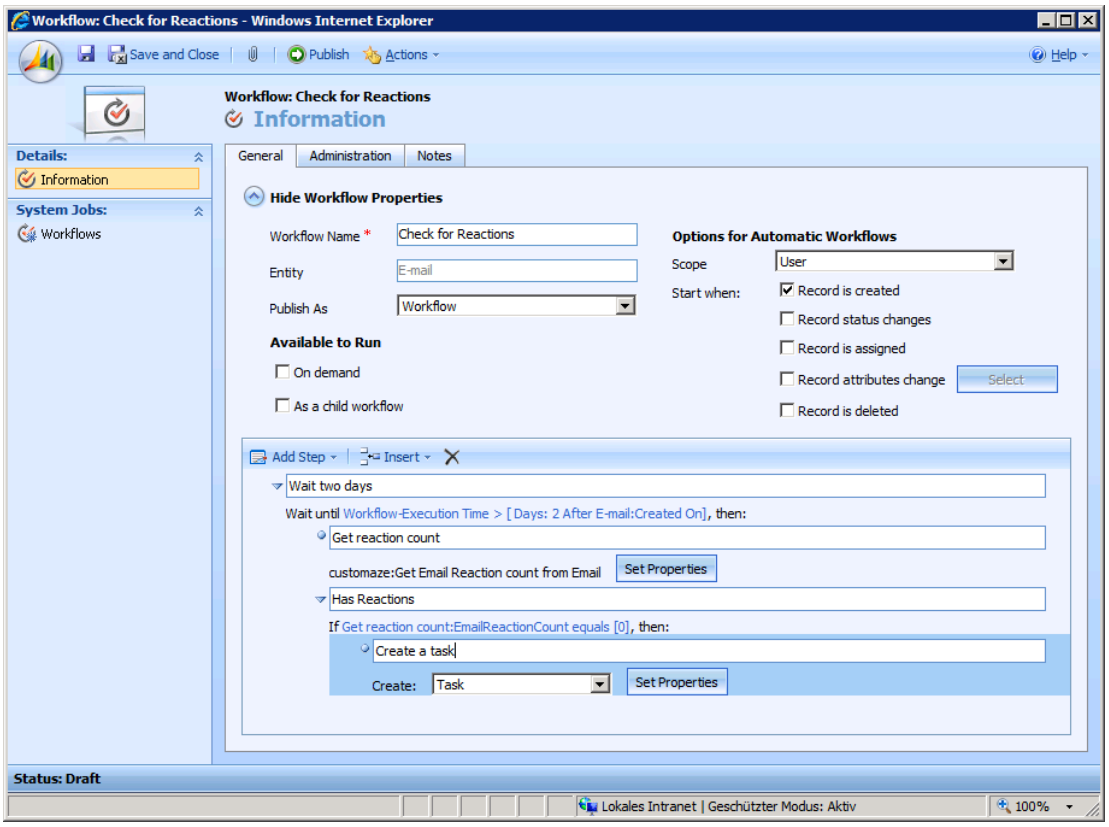


Click the row below that check condition and react properly. In our example, we’re going to create a task for the sender of the email. But everything else would be possible as well.

Click “Add Step – Create Record”. Set the Create dropdown to “Task”. Configure the Properties to contain something like this:



The whole workflow should look like this:



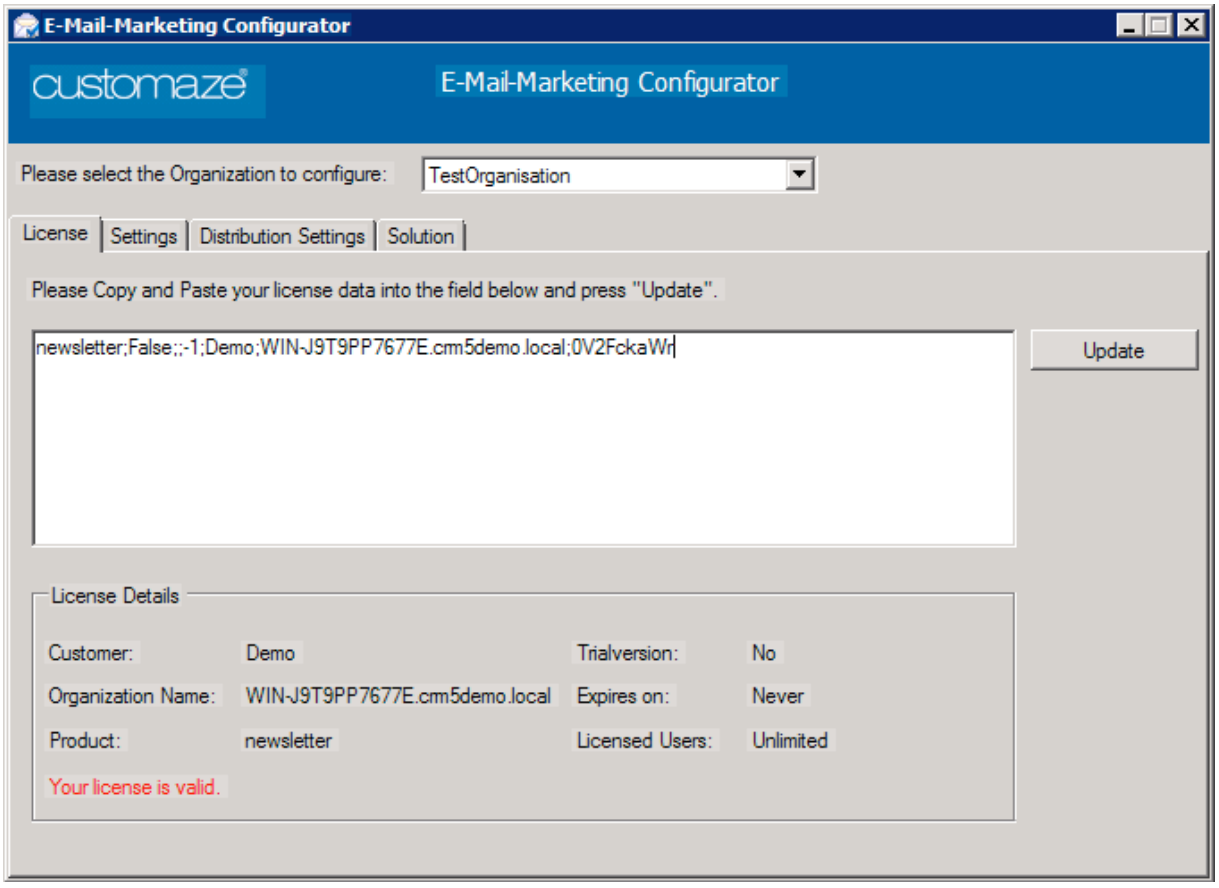
Click “Publish” to save and publish the workflow.

Appendix

E-Mail-Marketing Configurator

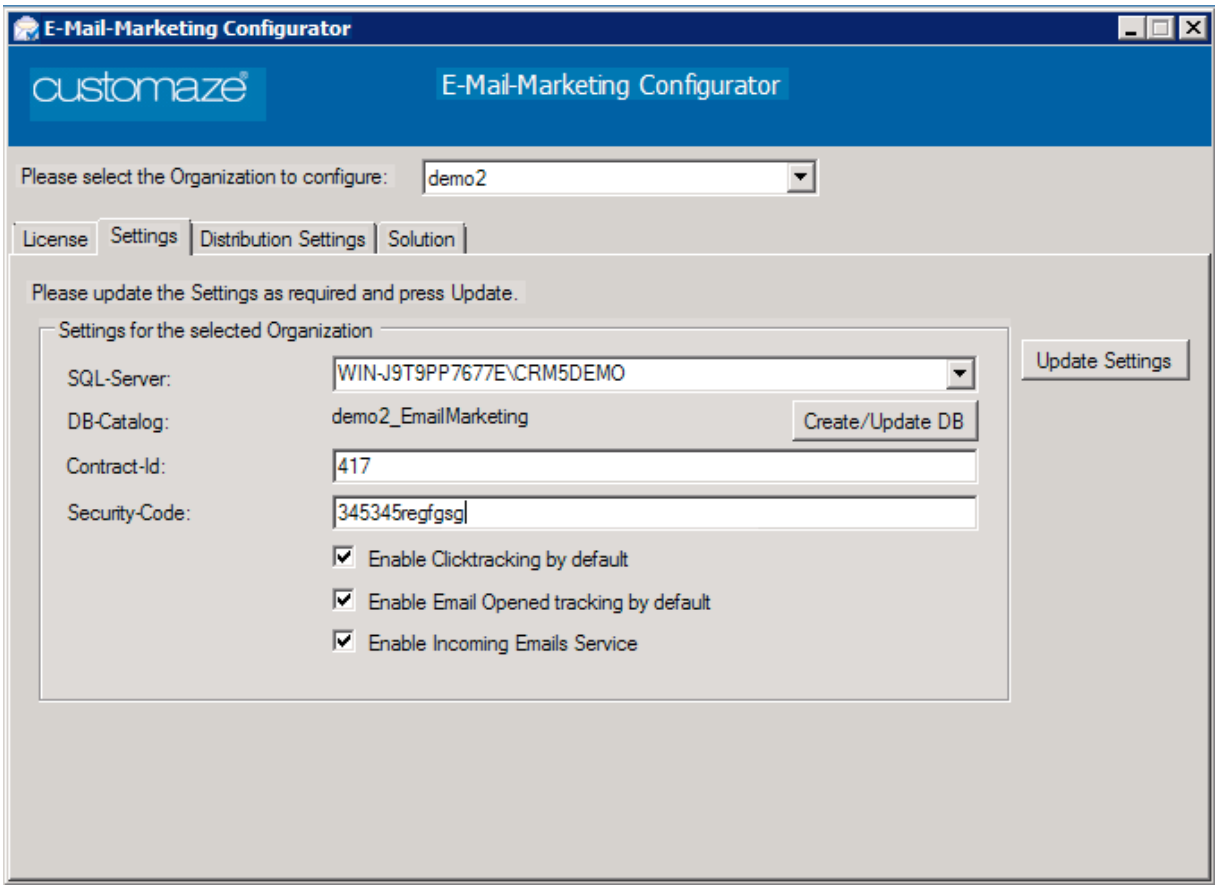
The License Tab

On the License Tab you can check your licenses. (Licenses for E-Mail Marketing start with "newsletter;")



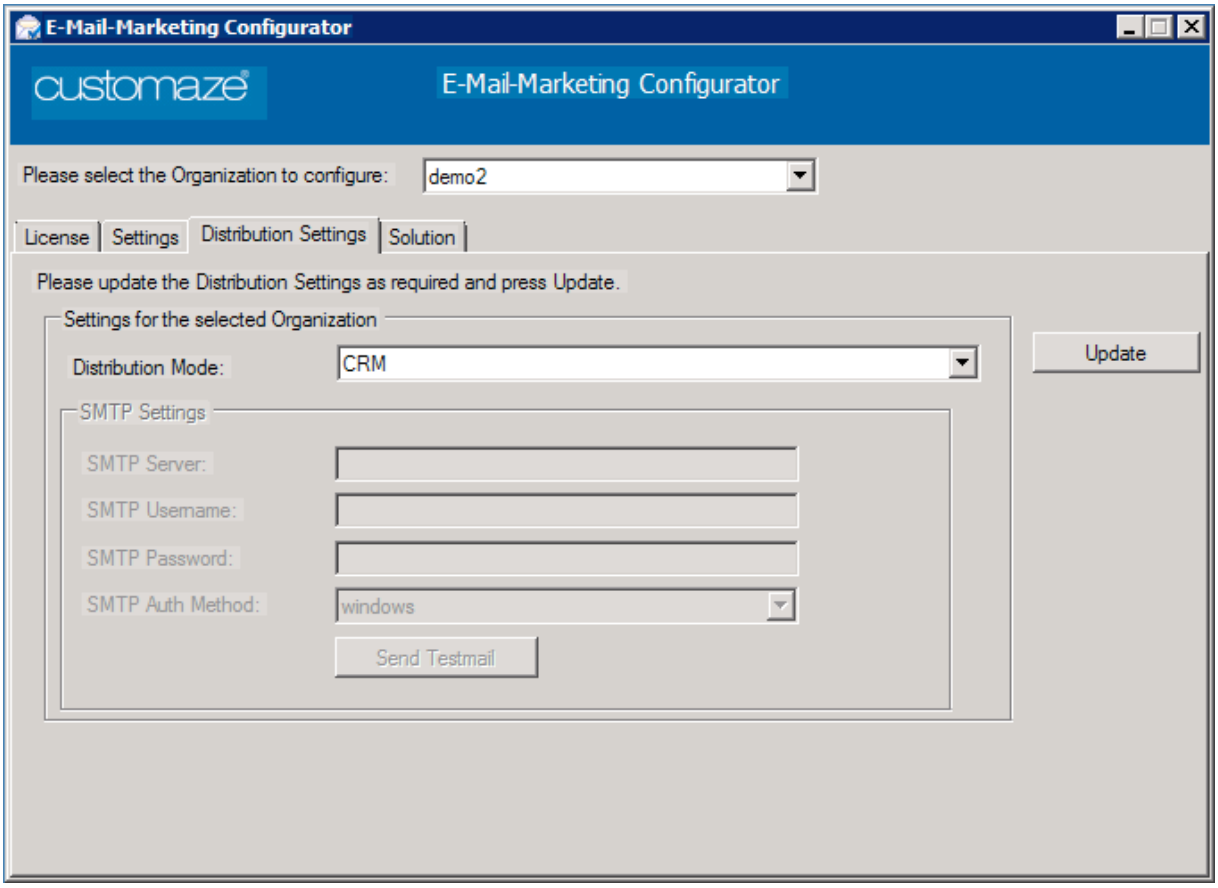
The Settings Tab

Use this dialog to create new databases (you'll need this when you deploy new organizations) or to update existing organizations other than the first organization automatically updated during setup.



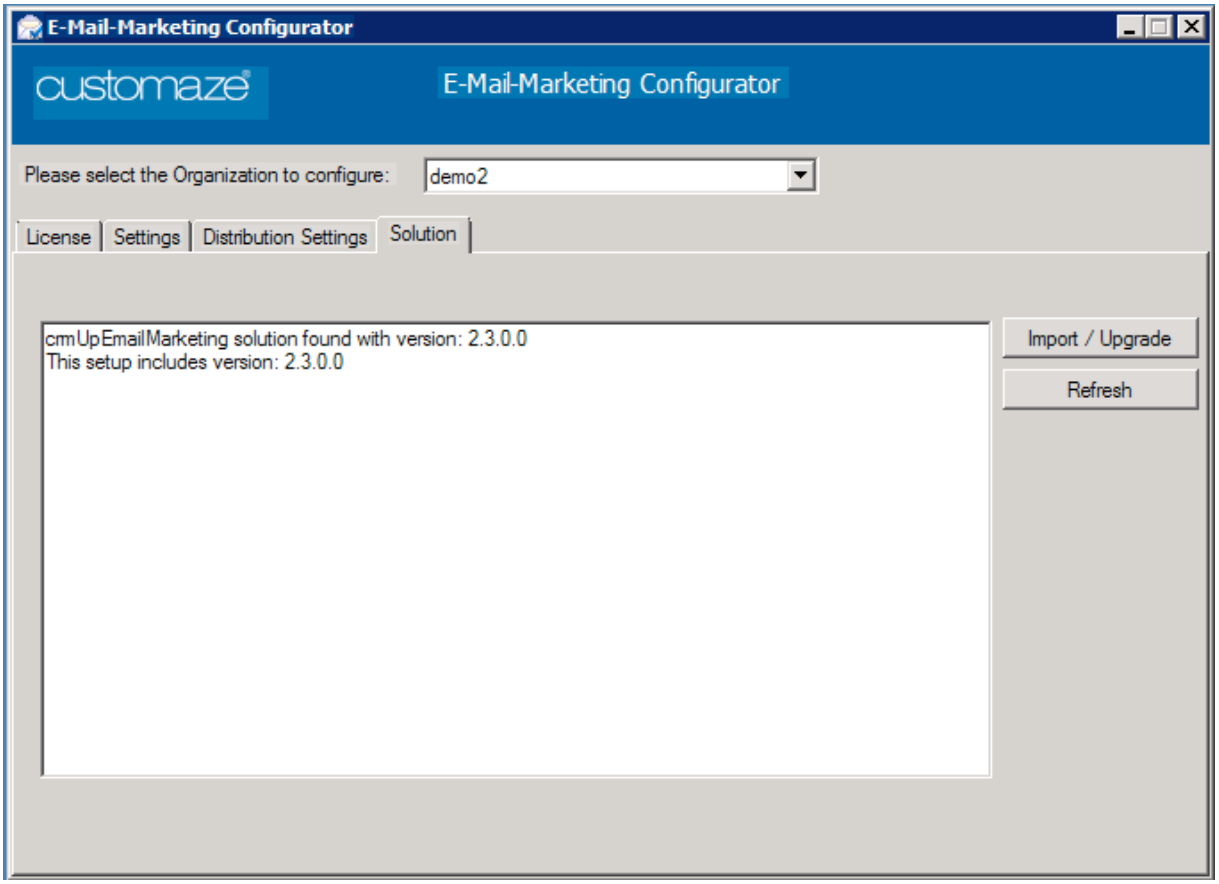
The Distribution Settings Tab

Use this Tab to define the way your e-mail will be send.



The Solution Tab

The crmUp Email Marketing solution contains the custom entity “crmup_emailreaction”, an addition to the navigation bar of the campaign entity, a couple of workflow assemblies and a plugin that can be registered on the send step of the email entity to send every email with the email marketing templating and link tracking engine.



To remove the solution, delete it in CRM. Please be careful: This also deletes all Email Reactions.

How to setup a new Organization

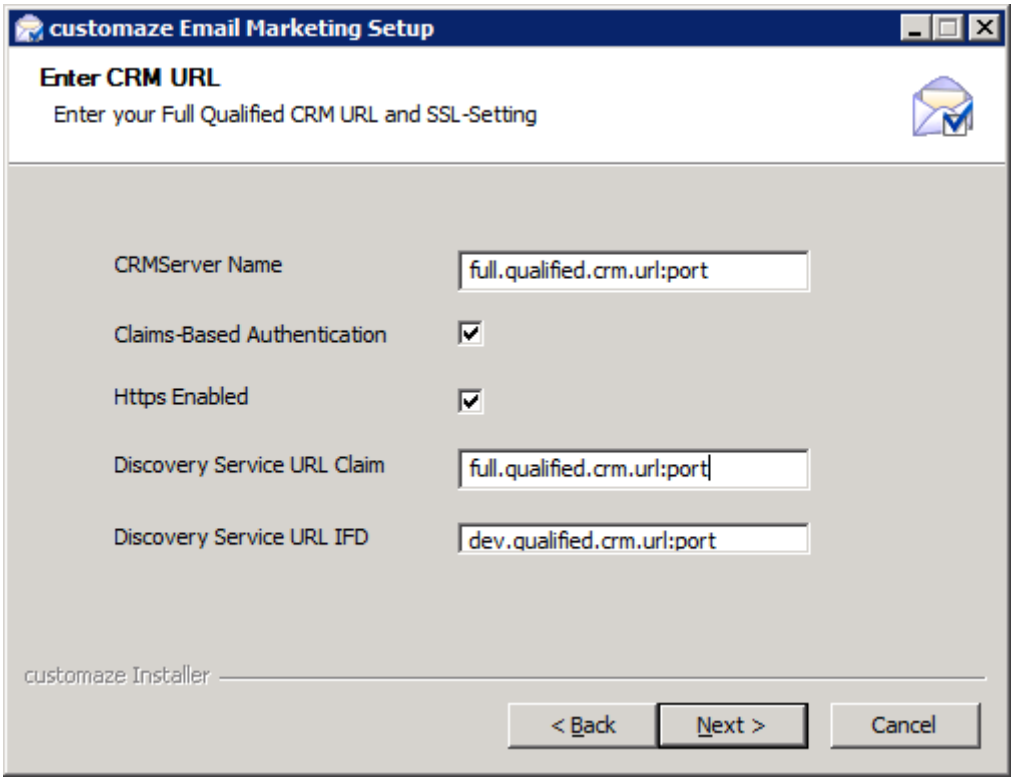
If you would like to use Email Marketing with other organizations than the first one selected during setup, you need to use the Email Marketing Configurator.

You need an additional contract id and security code for every organization that you would like to deploy Email Marketing to. Contact info@customaze.de

Setup a new Organization with the Configurator

1) Select the organization to configure from the dropdown
2) Go to the settings tab
    a. Select the SQL server to use and click “Create / Update DB”
    b. Enter contract id and security code
    c. Click Update Settings
3) Go to the Distribution Settings tab
    a. Setup SMTP or leave it to CRM based distribution
    b. Click Update
4) Go to the Solution tab
    a. Click “Import/Upgrade” and wait for the process to finish
5) Open up the organization in CRM and verify if Email Marketing appears in the navigation bar of the campaign entity

How to determine CRM URL



The Setup will ask you for some CRM URLs. You can easily determine these addresses with PowerShell.

Please open PowerShell on the CRM Server and enter the following Commands:

```
Add-PSSnapin Microsoft.CRM.PowerShell

$crmUrl = Get-CRMSetting webAddressSettings

$crmUrl.DiscoveryRootDomain
```

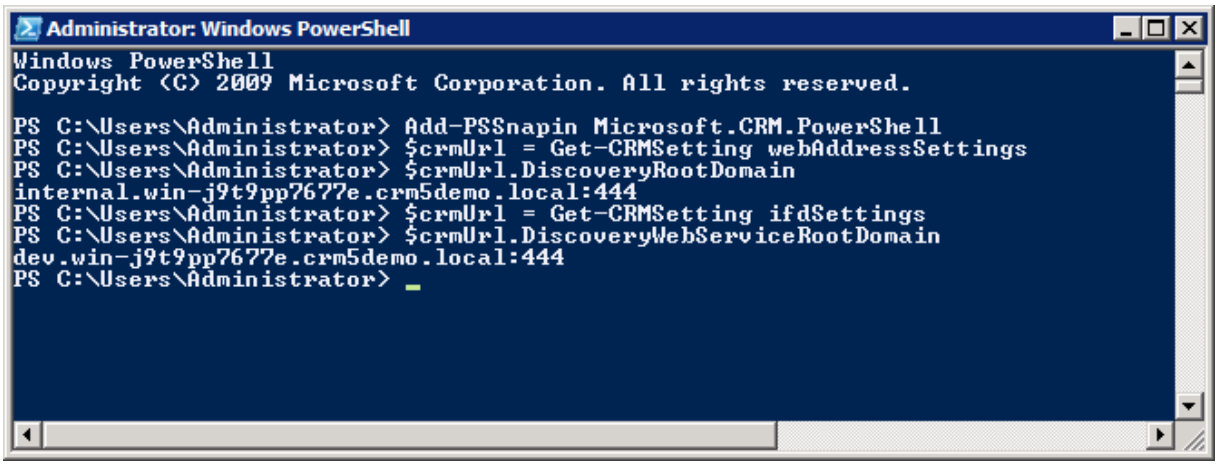
The output is the CRMServer Name and the Discovery Service URL Claims

```
$crmUrl = Get-CRMSetting ifdSettings

$crmUrl.DiscoveryWebServiceRootDomain
```

The output is the Discovery Service URL IFD

The “Discovery Service URL Claims” and the “Discovery Service URL IFD” can be left blank if they do not apply to your configuration.

The output in the PowerShell windows is similar to the picture below.



Contact Information

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